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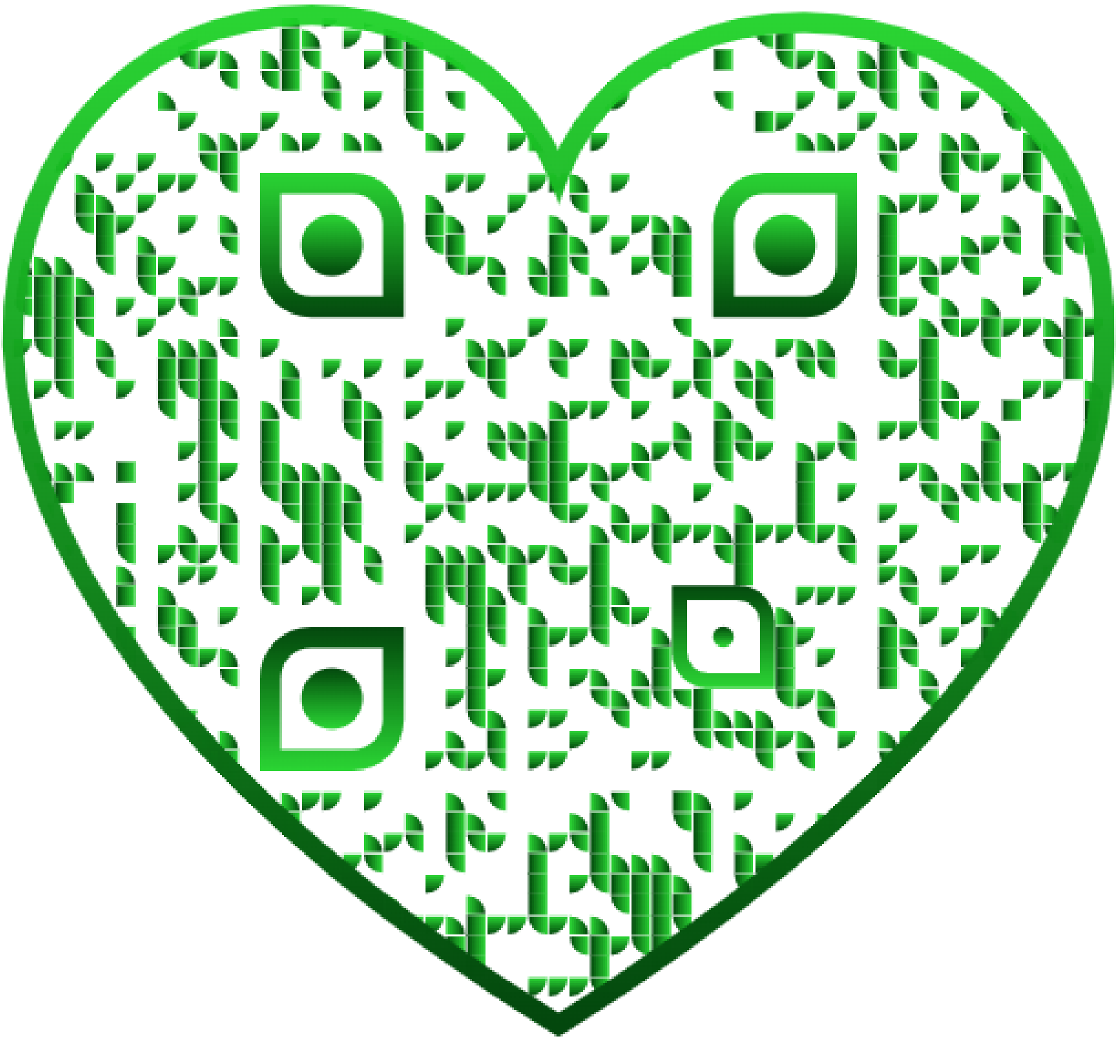

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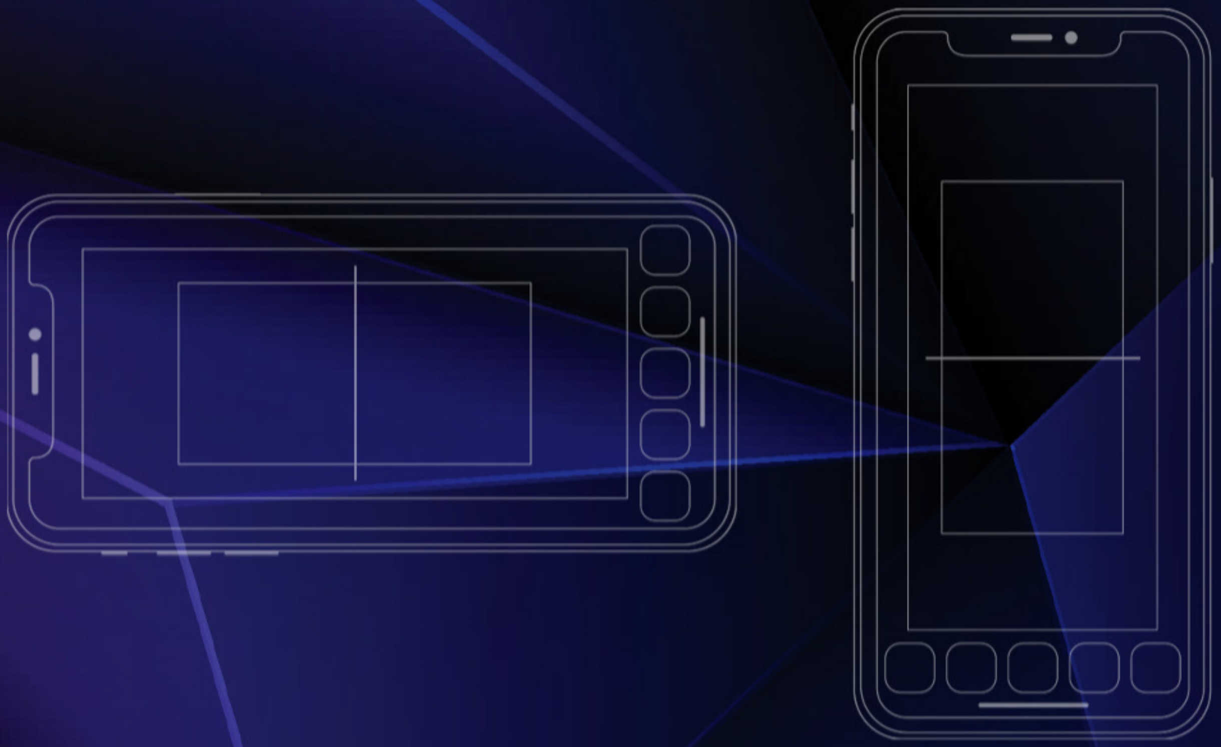

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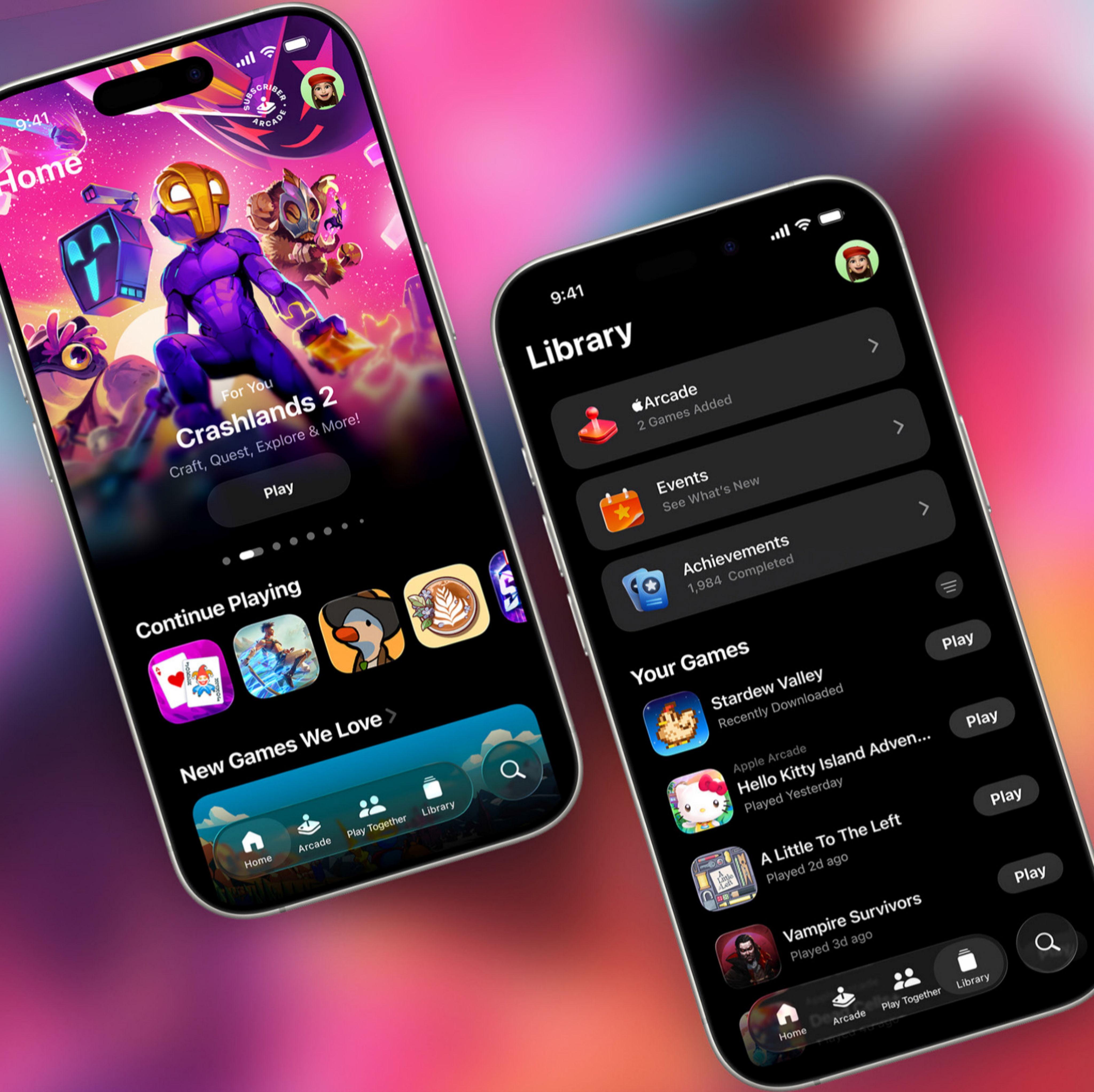
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Vampire Survivors
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Play
Home
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CHATGPT STUDY MODE TURNS AI INTO A PERSONALIZED LEARNING COACH 08

TESLA SIGNS $16.5 BILLION CHIP SUPPLY DEAL WITH SAMSUNG TO SECURE FUTURE VEHICLE COMPUTING 46

GAMES - A UNIFIED EXPERIENCE FOR GAMING ACROSS THE ECOSYSTEM 60

APPLE TO OPEN MANUFACTURING ACADEMY IN DETROIT AS IT INVESTS IN U.S. TALENT 98

NVIDIA’S $4 TRILLION VALUE MARKS A NEW ERA FOR AI, AND THE GROWTH HAS JUST BEGUN **20**

DEEPSEEK’S AI DOMINANCE IN CHINA CHALLENGED AS ALIBABA’S QWEN GAINS GROUND **32**

MICROSOFT LAUNCHES EDGE COPILOT MODE AS AI COMES TO THE BROWSER FRONTLINE **88**

WAYMO PLANS TO WIDEN ROBOTAXI LEAD OVER TESLA WITH 2026 DALLAS LAUNCH **108**

NVIDIA ORDERS 300,000 H20 CHIPS FROM TSMC AS DEMAND IN CHINA SURGES **118**

APPLE CARPLAY ULTRA FACES INDUSTRY BACKLASH AS AUTOMAKERS PULL SUPPORT.. **128**

APPLE INVESTS $500 MILLION TO SOURCE CRITICAL IPHONE MATERIAL FROM THE U.S. **138**

JPMORGAN CHASE EMERGES AS TOP CONTENDER TO TAKE OVER APPLE CARD FROM... **146**

INDIA ACCOUNTS FOR 44% OF U.S. SMARTPHONE IMPORTS IN Q2 2025 AS TARIFFS DISRUP... **154**

APPLE EXPANDS LIVE VIDEO SHOPPING SERVICE TO INDIA FOLLOWING U.S. LAUNCH **162**

INDIA SURPASSES CHINA IN SMARTPHONE EXPORTS TO U.S. AS MANUFACTURING SOARS 240% **170**

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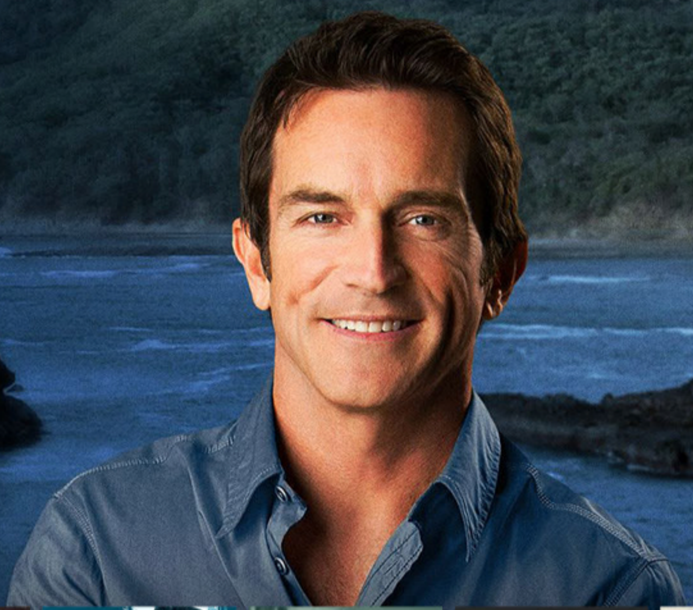

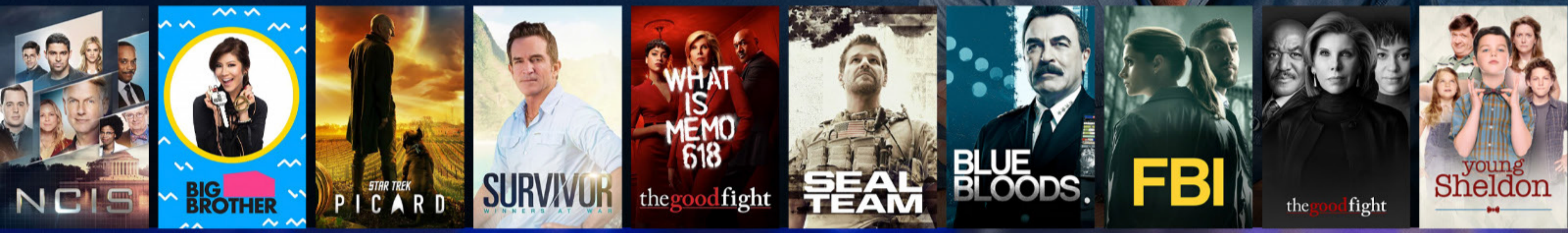
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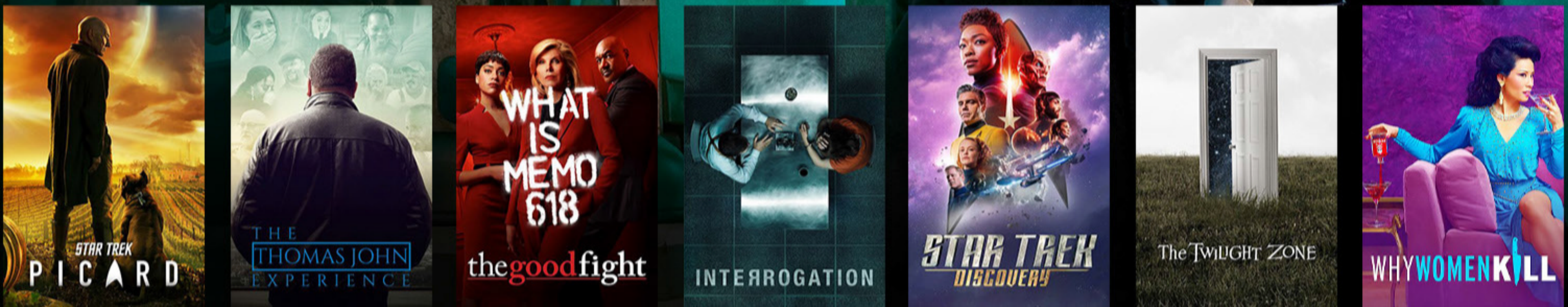
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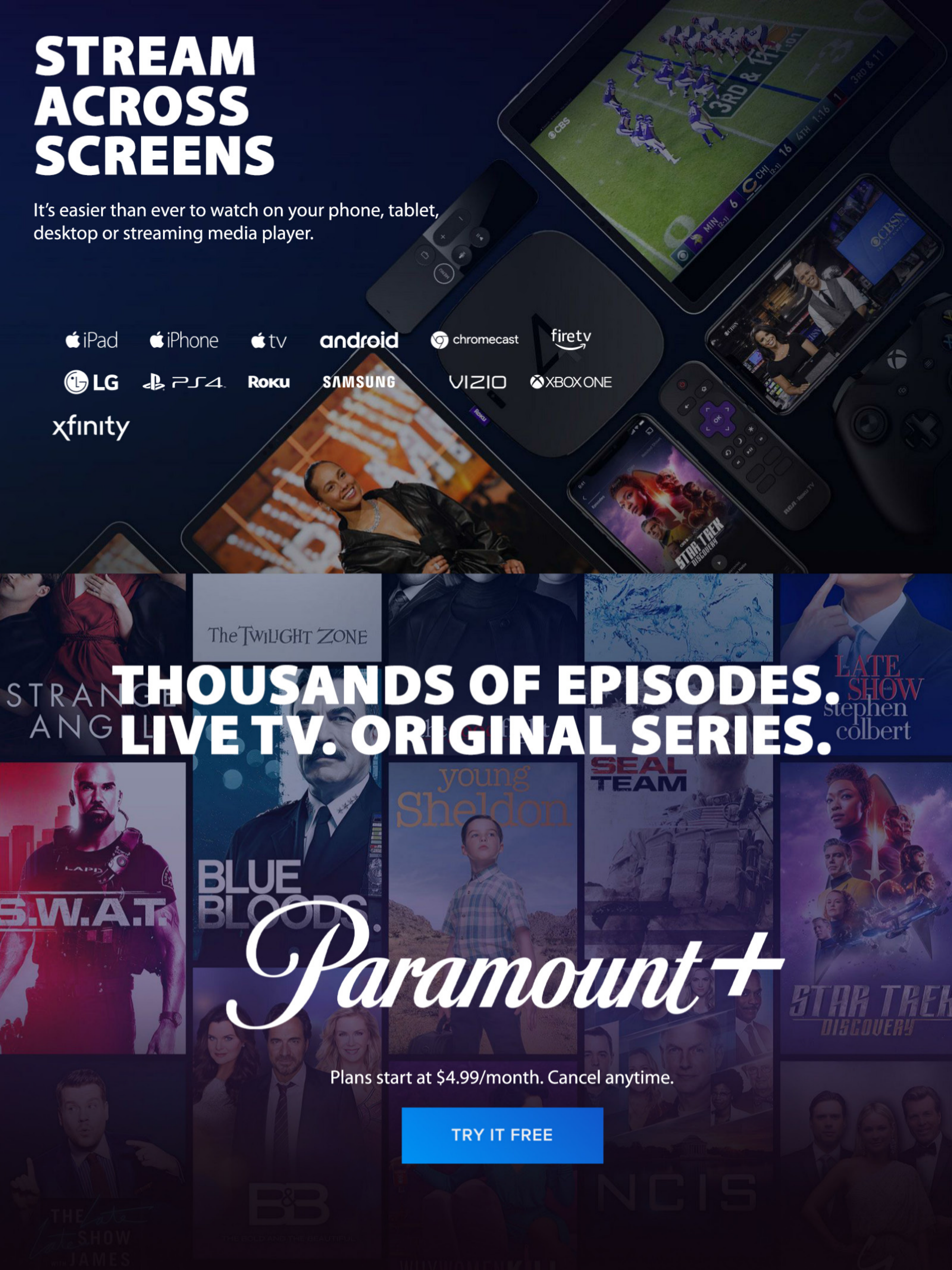

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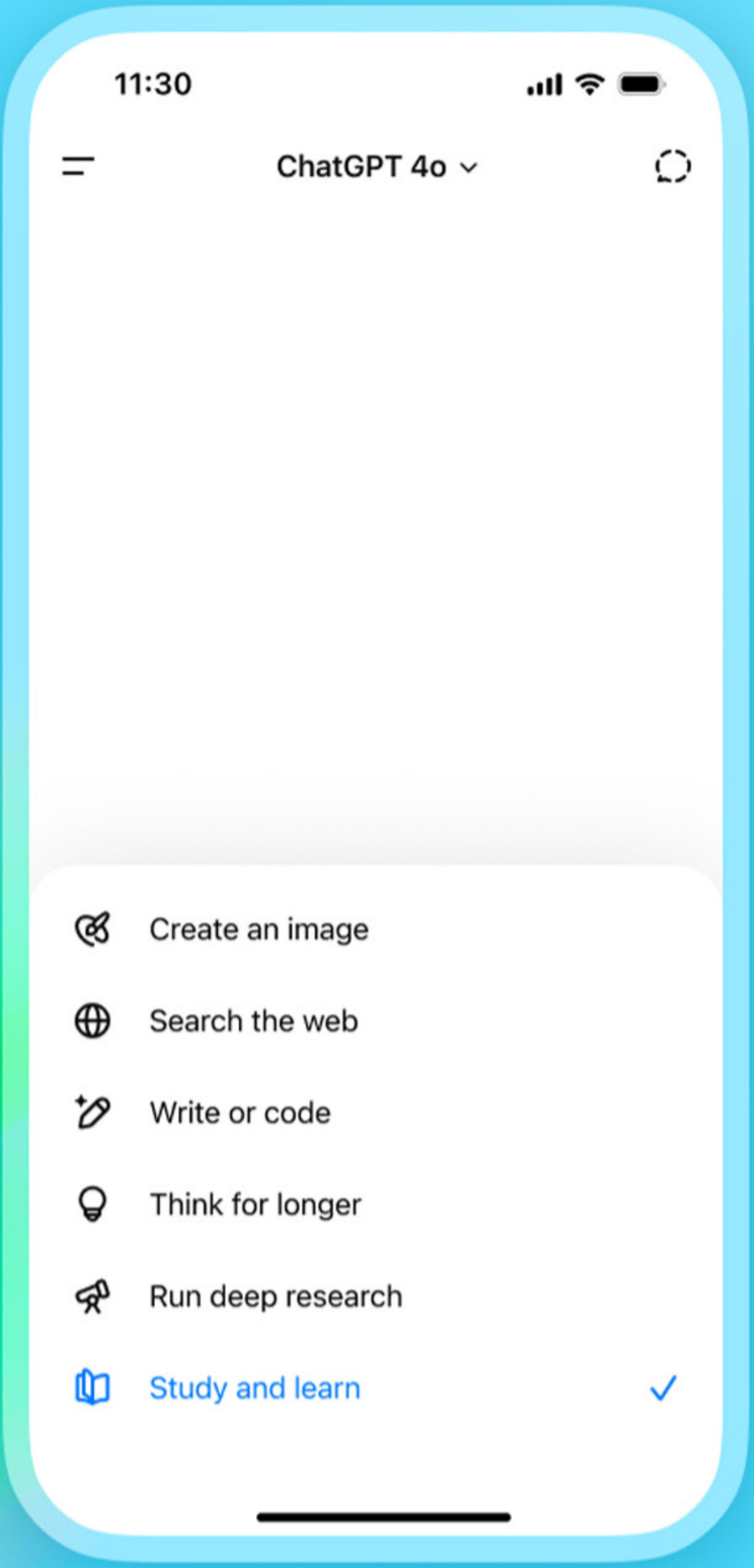
CHATGPT STUDY MODE TURNS AI INTO A PERSONALIZED LEARNING COACH

OpenAI has launched a new Study Mode for ChatGPT, signaling a significant shift in how generative AI can be used not just for quick answers, but as a true learning companion. Unlike the traditional ChatGPT interface, which focuses on providing direct responses, Study Mode is designed to guide users through concepts, encourage critical thinking, and support long-term retention—making it particularly valuable for students, self-learners, and professionals preparing for certifications or upskilling.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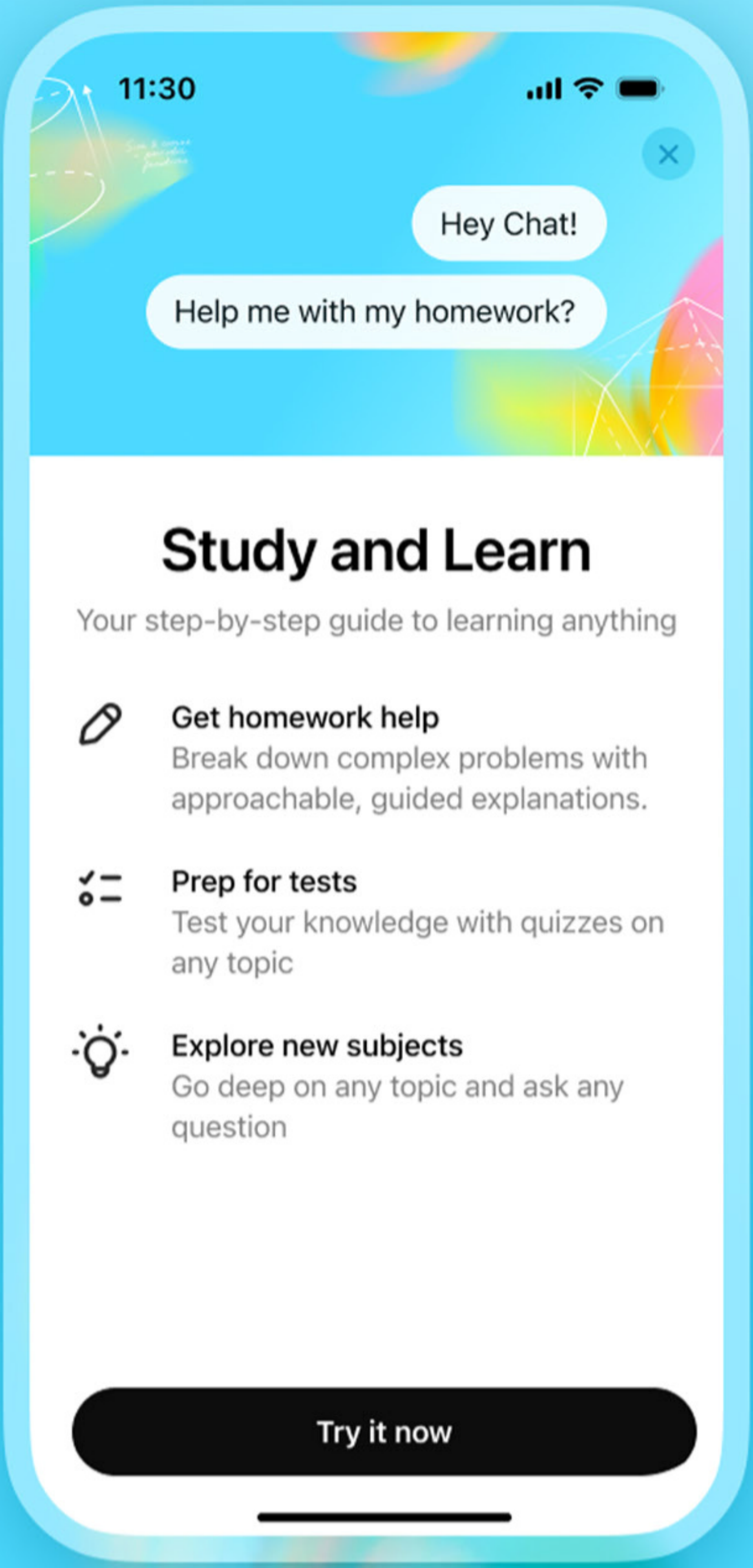
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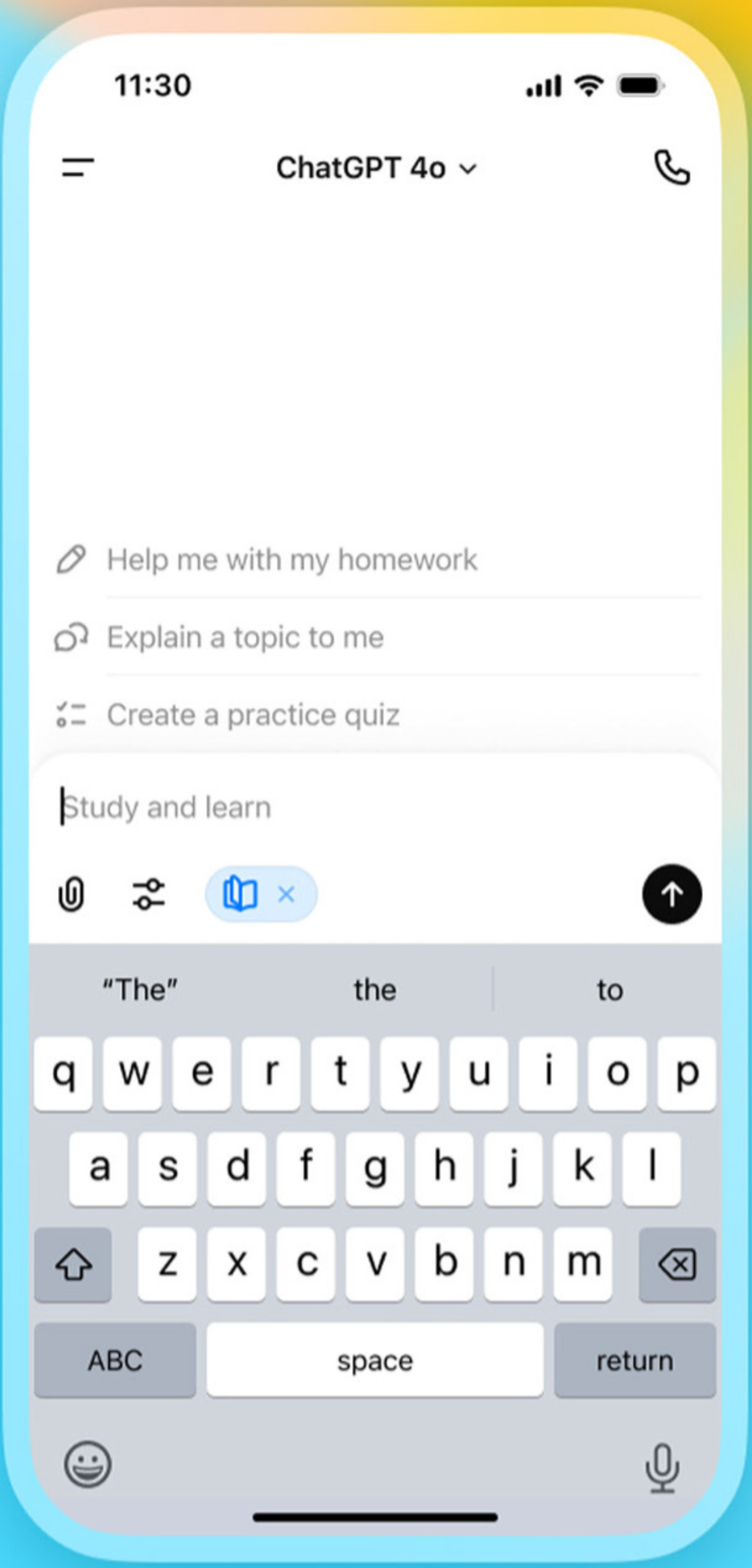


The rollout comes as ChatGPT sees increasing adoption in classrooms, tutoring platforms, and online courses. While educators have debated the tool's impact on academic integrity, OpenAI's new direction reflects a growing trend: generative AI isn't just a shortcut to answers—it can be structured to enhance comprehension and support personalized education.

HOW STUDY MODE WORKS DIFFERENTLY FROM REGULAR CHAT

Study Mode introduces a more interactive learning structure, prompting users to engage with material instead of passively consuming responses. When a user asks a question in Study Mode—such as a math problem, a biology concept, or a historical topic—the assistant doesn't simply give the answer. Instead, it might:

- Break the problem down step-by-step
- Ask follow-up questions to test the user's understanding
- Provide multiple examples or visualizations
- Pause to allow the user to attempt part of the problem
- Offer hints before delivering full explanations

This tutoring-style approach helps reinforce concepts and prevents users from skipping the cognitive process that's essential to deep learning. Users can toggle between explanation levels (basic, intermediate, advanced), depending on their comfort level and learning goals.

The experience is especially useful for STEM subjects, where understanding problem-solving methods is more valuable than just seeing the final answer. In language learning, Study Mode can quiz users on grammar rules, vocabulary, or writing mechanics—then offer feedback on their input to support skill building.

PERSONALIZED LEARNING AT SCALE

One of the most powerful aspects of Study Mode is its ability to adjust dynamically to a user's pace, knowledge gaps, and strengths. Instead of offering a one-size-fits-all answer, ChatGPT tracks the flow of a learning session and tailors responses accordingly. For example, if a user struggles with a calculus concept, the system may offer simpler analogies or draw connections to prior knowledge before returning to the more advanced explanation.

This adaptive pedagogy mirrors the core benefits of one-on-one tutoring—something historically accessible only to those with the time or money for private instruction. With Study Mode, OpenAI aims to democratize that experience by making personalized learning accessible to anyone with an internet connection.

The mode also includes support for spaced repetition techniques, inline quizzes, and suggested practice prompts to reinforce key concepts over time. These features are designed to reduce cognitive overload and strengthen memory consolidation, two challenges often faced by self-directed learners.

TARGET USERS: STUDENTS, LIFELONG LEARNERS, AND PROFESSIONALS

Study Mode is already gaining traction among high school and college students who use ChatGPT for homework help, test prep, or subject review. But its use cases extend far beyond traditional education.

nAI

For professionals preparing for licensing exams—such as the LSAT, GRE, CFA, or AWS certifications—Study Mode can simulate exam-style questions, walk through correct and incorrect responses, and build custom study plans based on weak areas. In language acquisition, it can serve as a grammar coach, a pronunciation guide, or a writing feedback tool.

Lifelong learners pursuing subjects like history, economics, philosophy, or computer science can also use the tool to explore topics in depth, track their understanding across sessions, and get tailored reading recommendations and projects to deepen engagement.

WHY IT MATTERS IN THE EVOLUTION OF AI ASSISTANTS

The launch of Study Mode comes at a time when critics have raised concerns that AI assistants are enabling shortcut culture—allowing users to bypass real effort and simply get results. OpenAI's shift toward scaffolded learning directly addresses that critique by using AI to encourage exploration, practice, and reasoning, rather than rote memorization or copy-paste behavior.

It also highlights a growing divergence in how AI models are being deployed: while some platforms emphasize speed and output, OpenAI is positioning ChatGPT—especially in Study Mode—as a cognitive partner that supports understanding, not just productivity.

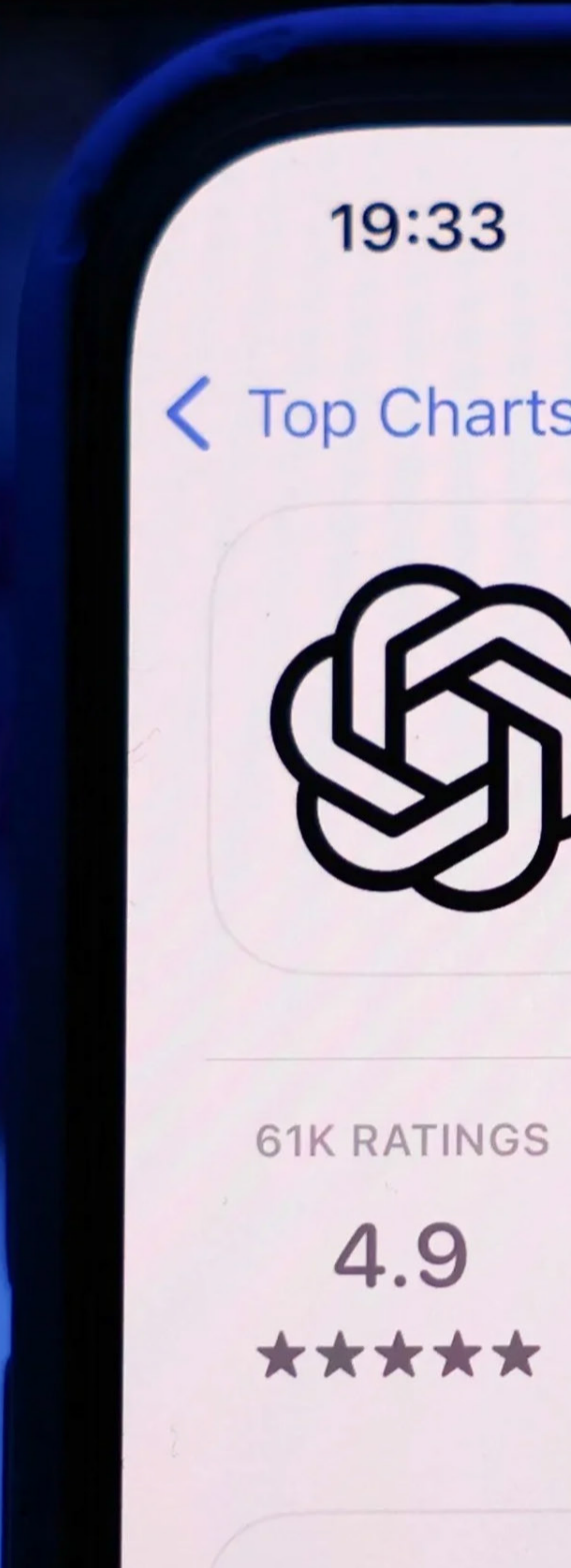
Over time, this model could integrate with educational platforms, digital classrooms, and personal learning management systems (LMS), further blurring the lines between AI tutors and human-led instruction. OpenAI has already launched collaborations with Khan Academy and other learning providers, suggesting that Study Mode could evolve into an entire suite of AI-augmented education tools.

LOOKING AHEAD: STUDY MODE'S ROLE IN THE FUTURE OF LEARNING

With personalized learning projected to be a central trend in the next decade of education, Study Mode arrives at a pivotal moment. AI-powered tools that encourage effort, reflection, and growth mindset—rather than just information retrieval—are poised to transform how students learn and how educators teach.

As OpenAI continues refining the feature, possible next steps include adding voice-based interactions, visual diagram support, progress tracking dashboards, and integration with school-level curriculum standards.

For now, Study Mode is available to ChatGPT Plus users and select educational partners. It may still be early in its development, but it's already redefining how artificial intelligence can act not just as a tool, but as a learning collaborator.



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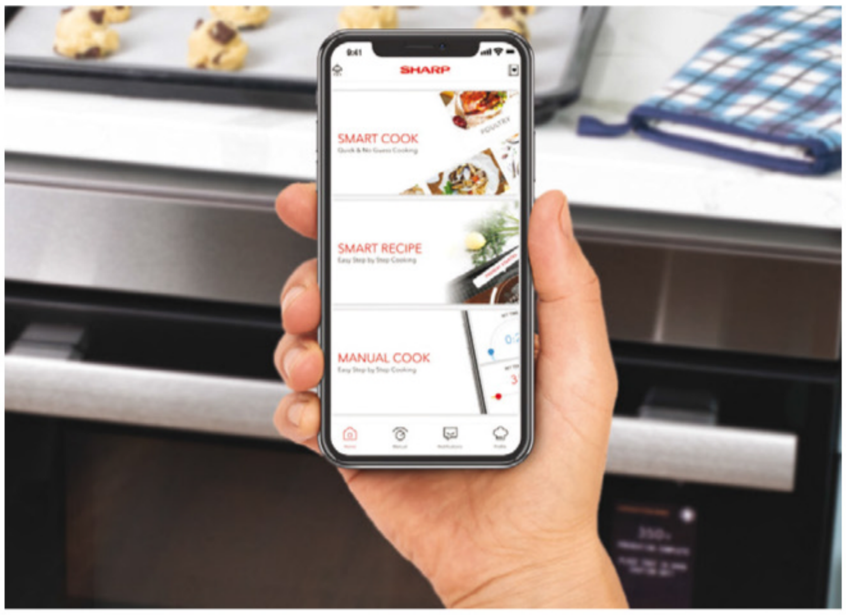

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NVIDIA'S $4 TRILLION VALUE MARKS A NEW ERA FOR AI, AND THE GROWTH HAS JUST BEGUN

Nvidia has surged past a $4 trillion market capitalization, becoming the world's most valuable publicly traded company—and analysts suggest this is only the beginning of its growth trajectory. Powered by insatiable demand for AI compute, data center expansion, and its unrivaled dominance in GPU architecture, Nvidia is now at the heart of the global technology stack.

The company's valuation has more than tripled in under two years, fueled by its pivotal role in powering generative AI applications, large language models, autonomous systems, and accelerated computing for enterprises and governments worldwide. With no clear rival in sight and demand outpacing supply across nearly all segments, Nvidia is no longer just a chipmaker—it's the engine behind the AI economy.

A $4 trillion market cap is historic, but Nvidia's strategic positioning and expanding software footprint suggest that ceiling has not yet been reached.

AI DEMAND PUSHES NVIDIA INTO STRATEGIC MONOPOLY TERRITORY

Nvidia's growth has been supercharged by the rapid adoption of generative AI and large-scale model training, which require immense parallel processing capabilities. Its H100 and B200 chips remain the industry standard for AI workloads, with hyperscalers like Microsoft, Amazon, Meta, and Google all racing to secure Nvidia hardware to support their expanding AI infrastructure.

The scarcity of advanced chips and Nvidia's full-stack ecosystem—from CUDA software to networking and server design—has created a strategic moat. While rivals like AMD and Intel are developing competing accelerators, Nvidia continues to dominate on both performance and developer tooling.

Demand for GPUs isn't just tied to training. AI inference, real-time services, enterprise deployment, and edge processing are all expanding GPU usage far beyond the cloud, embedding Nvidia even deeper into global compute infrastructure.

Image: Mariia Shalabaieva

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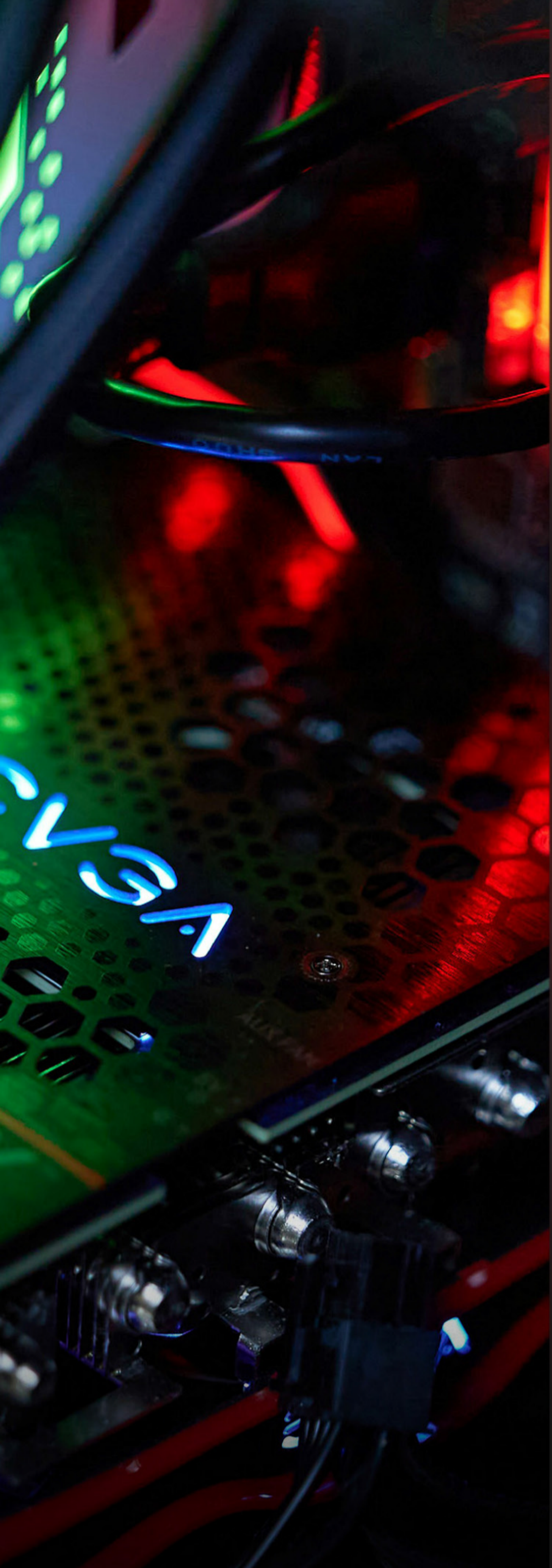


THE AI INFRASTRUCTURE CYCLE IS JUST STARTING

Industry analysts argue that Nvidia's rise mirrors the early days of the internet or cloud computing—where massive infrastructure investment was only beginning to take shape. Despite recent multibillion-dollar orders from tech giants and sovereign AI funds, global AI infrastructure is still underbuilt relative to future demand.

With governments, healthcare systems, financial institutions, and logistics companies all moving to deploy AI at scale, Nvidia's total addressable market (TAM) is expected to grow well into the next decade. Goldman Sachs recently raised its 12-month price target for Nvidia, citing multi-year enterprise upgrade cycles, AI-native data center architectures, and growth in sovereign compute initiatives.

Nvidia is also exploring deeper integration with cloud providers and enterprise platforms, offering dedicated AI cloud services that blend hardware, software, and APIs in a single offering. This hybrid strategy extends the company's dominance beyond chips into the full stack of AI infrastructure.

SOFTWARE, SYSTEMS, AND SERVICES DRIVE FUTURE MARGINS

While Nvidia's hardware is the headline driver of revenue, its software and services ecosystem is quickly becoming a critical margin booster. The CUDA programming framework, along with proprietary libraries and AI models, creates a high barrier for customers to switch to competing platforms.

Nvidia’s AI Enterprise suite, Omniverse platform, and embedded software for autonomous driving and robotics are designed to turn one-time hardware sales into recurring revenue streams. This shift toward a software-defined GPU economy helps explain why the company’s gross margins continue to rise, even as competitors lower chip pricing to stay relevant.

The result is a company that earns not just from selling chips, but from powering the development, deployment, and monetization of AI solutions across nearly every sector.

GROWTH BEYOND TECH: SOVEREIGN AI AND GLOBAL EXPANSION

Nvidia’s influence is no longer limited to Silicon Valley. Nations are investing in sovereign AI infrastructure, and Nvidia is supplying much of the technology behind these efforts. The company has partnered with countries including Japan, Singapore, and Saudi Arabia to build AI supercomputing centers, often co-developed with local universities and defense agencies.

This expansion opens new revenue channels, particularly in regions where public and private sector investment in AI is accelerating. Emerging markets, in particular, are expected to contribute significantly to Nvidia’s next wave of growth as infrastructure spending catches up to digital demand.

GEFORCE RTX

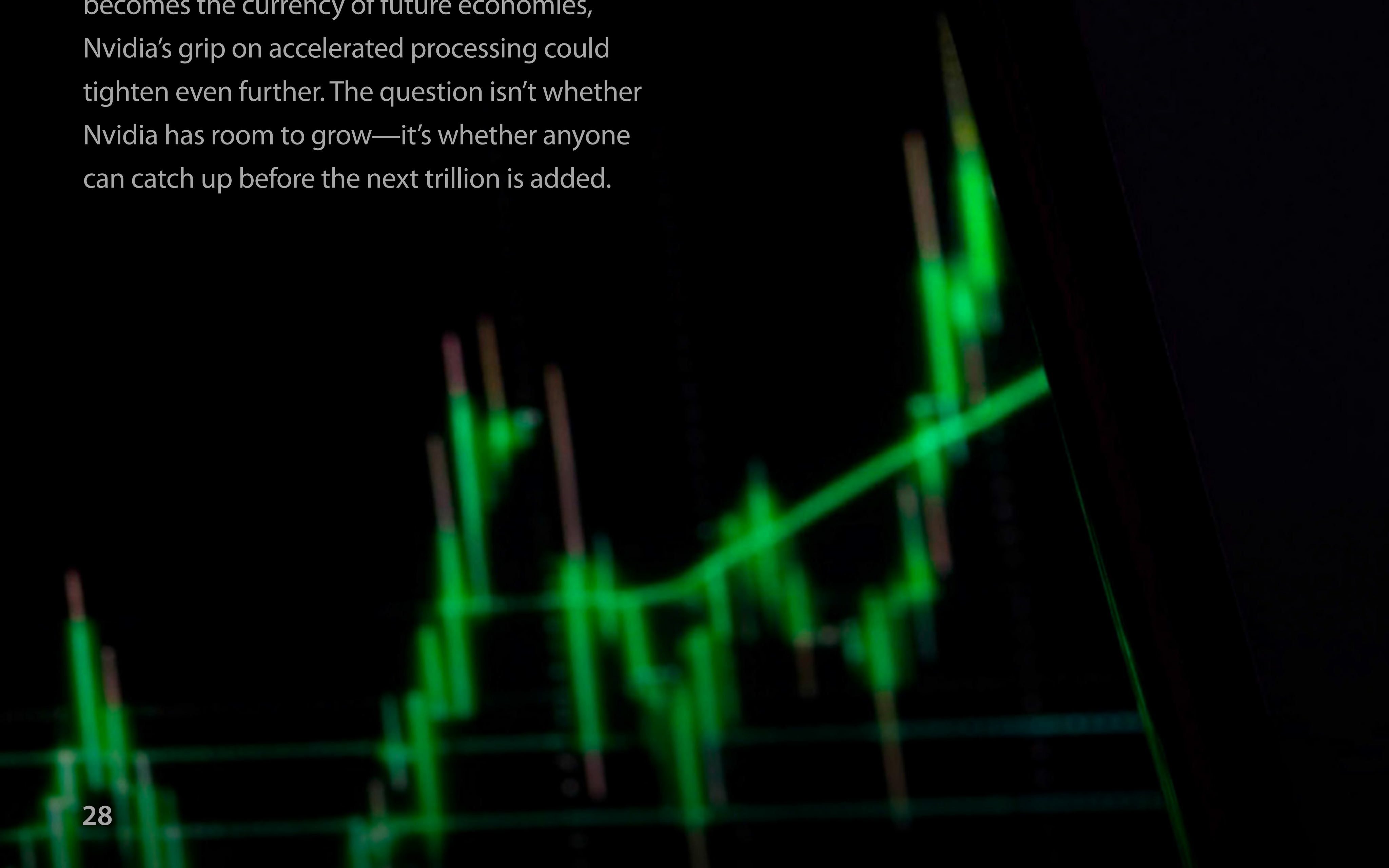
Image: Fredrick Tendong

In parallel, Nvidia is scaling its foundry relationships and vertically integrating more of its supply chain to maintain production velocity amid global semiconductor constraints. The company has also increased its AI research spending, positioning itself not only as a vendor but as a leader in foundational model innovation.

$4 TRILLION IS A MILESTONE—NOT A FINISH LINE

Nvidia's ascent past a $4 trillion market cap puts it in rare company, but analysts and investors view the milestone as a midpoint rather than a peak. The company's unique role in AI infrastructure, combined with expanding software margins and global strategic relevance, gives it a long-term growth narrative few others can match.

As industries realign around AI, and as compute becomes the currency of future economies, Nvidia's grip on accelerated processing could tighten even further. The question isn't whether Nvidia has room to grow—it's whether anyone can catch up before the next trillion is added.



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DEEPSEEK'S AI DOMINANCE IN CHINA CHALLENGED AS ALIBABA'S QWEN GAINS GROUND

China's generative AI race is intensifying as Alibaba's Qwen model family emerges as a serious rival to DeepSeek, the current domestic leader in large language model development. While DeepSeek has drawn attention for its rapid technical progress and early open-source releases, Alibaba's latest updates to its Qwen series position the e-commerce giant as a direct challenger in both performance and commercial deployment.

Qwen
deepseek

The battle reflects a broader shift in China's AI ecosystem, where major tech players are racing to localize, scale, and monetize foundational models to reduce reliance on U.S. technologies amid tightening export controls and rising strategic competition.

ALIBABA'S QWEN-2 SURGES AHEAD ON BENCHMARKS

The latest version of Alibaba's model, Qwen-2, has posted competitive results across key language understanding and reasoning benchmarks. Open evaluations show Qwen-2 outperforming DeepSeek's flagship models on tasks including MMLU, GSM8K, and HellaSwag—indicators of a model's reasoning, math, and commonsense capabilities.

Qwen-2 has also shown strong multilingual performance, particularly in Chinese-English translation and cross-lingual tasks, a key advantage for Alibaba's global-facing businesses. It supports context lengths up to 128K tokens, making it ideal for enterprise applications that require long-document processing, such as legal and financial analysis.

While DeepSeek initially led with its 7B and 67B models released under a permissive open-source license, Alibaba's newer models are increasingly challenging that technical edge—offering better inference efficiency, fine-tuning flexibility, and plug-and-play compatibility with major machine learning frameworks.

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SHIFTING DYNAMICS IN CHINA’S AI STACK

DeepSeek, backed by leading research institutions and investors in Beijing, gained early traction as China’s most open and capable LLM provider. Its models were among the first to approach GPT-3.5 levels in Chinese-language performance, giving researchers and startups a homegrown alternative to Western tools.

However, Alibaba brings significant advantages in infrastructure, cloud distribution, and commercial scale. With access to massive compute through its Alibaba Cloud division, and an enterprise client base spanning retail, logistics, and finance, Qwen models are now being directly deployed into end-user scenarios.

This is shifting momentum away from pure research labs toward platform companies that can train, fine-tune, and deliver models as part of full-stack AI services—closer in approach to how Amazon, Google, and Microsoft operate in global markets.

ENTERPRISE AND GOVERNMENT INTEREST DRIVES COMPETITION

The Chinese government is pushing for greater adoption of domestic AI models across education, finance, healthcare, and public administration. That directive is accelerating demand for high-performance, locally trained LLMs with enterprise-grade security and regulatory compliance.

Alibaba’s Qwen series, pre-integrated with Alibaba Cloud’s infrastructure and APIs, is particularly well-suited for rapid deployment in business settings. DeepSeek, by contrast,

Image: Dado Ruvic

remains primarily focused on research-grade releases and academic collaboration, though it has begun exploring commercialization routes through partnerships.

Analysts expect government procurement policies to favor platforms that can offer sovereign control, technical transparency, and vertical customization—features that Alibaba is increasingly emphasizing as part of its AI-as-a-Service model.

THE OPEN-SOURCE FACTOR STILL MATTERS

Despite Alibaba's growing lead in commercialization, DeepSeek continues to benefit from its open-source credibility, which makes its models attractive to startups, universities, and developers building new applications across language, vision, and agent-based systems.

Its permissive licensing and community engagement have helped it gain traction in the developer ecosystem, and Chinese AI researchers still cite DeepSeek among the most accessible and modifiable model families available.

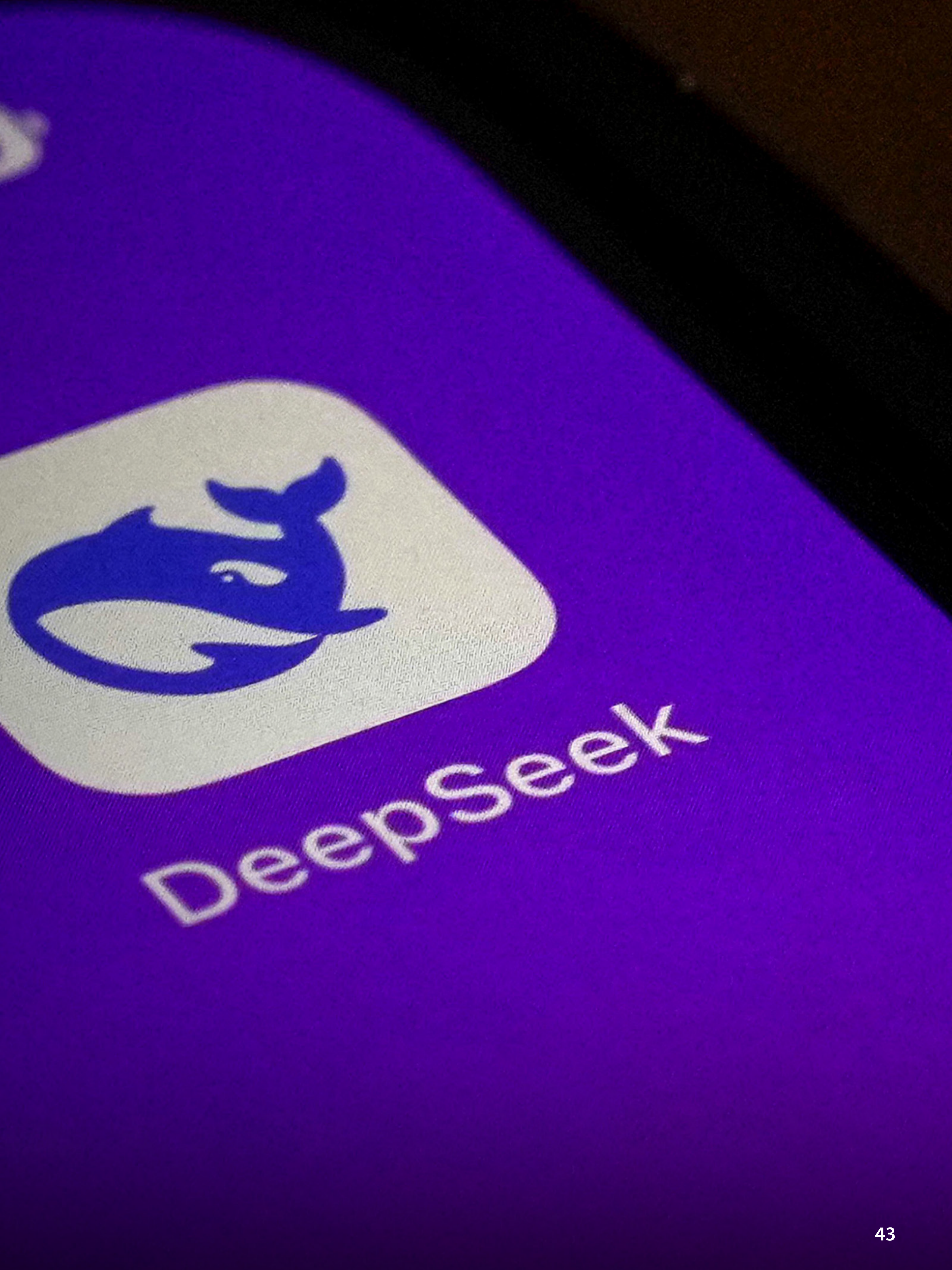
That said, Alibaba is beginning to shift its own licensing strategy, recently open-sourcing select Qwen models under Apache 2.0, signaling a move to compete for the same open-source mindshare while offering a clearer upgrade path to enterprise-scale services.

LOOKING AHEAD: TWO PATHS TO CHINA'S AI FUTURE

The competition between DeepSeek and Qwen reflects two models of AI development in China—one rooted in open research and decentralization, the other in vertically integrated cloud platforms optimized for commercial deployment.

As China pushes to become self-reliant in foundational AI capabilities, both paths are likely to coexist. DeepSeek may remain the go-to for flexible, community-driven innovation, while Alibaba's Qwen solidifies its role as the backbone for industrial-scale AI systems.

In the near term, however, Alibaba's combination of compute, cloud services, and enterprise access puts it in a strong position to eclipse DeepSeek's early dominance—especially as regulatory momentum shifts toward scalable, compliant, and monetizable AI.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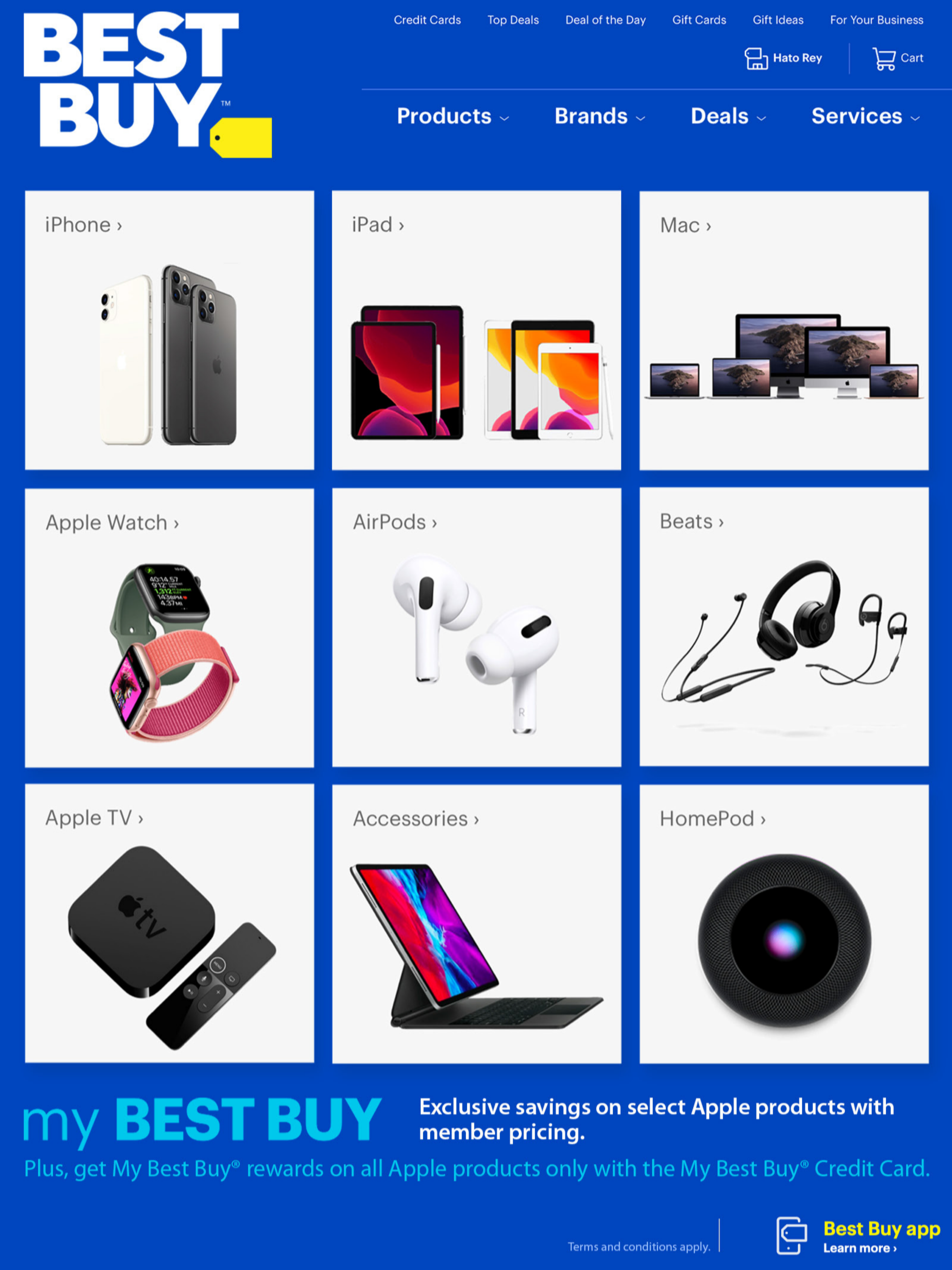
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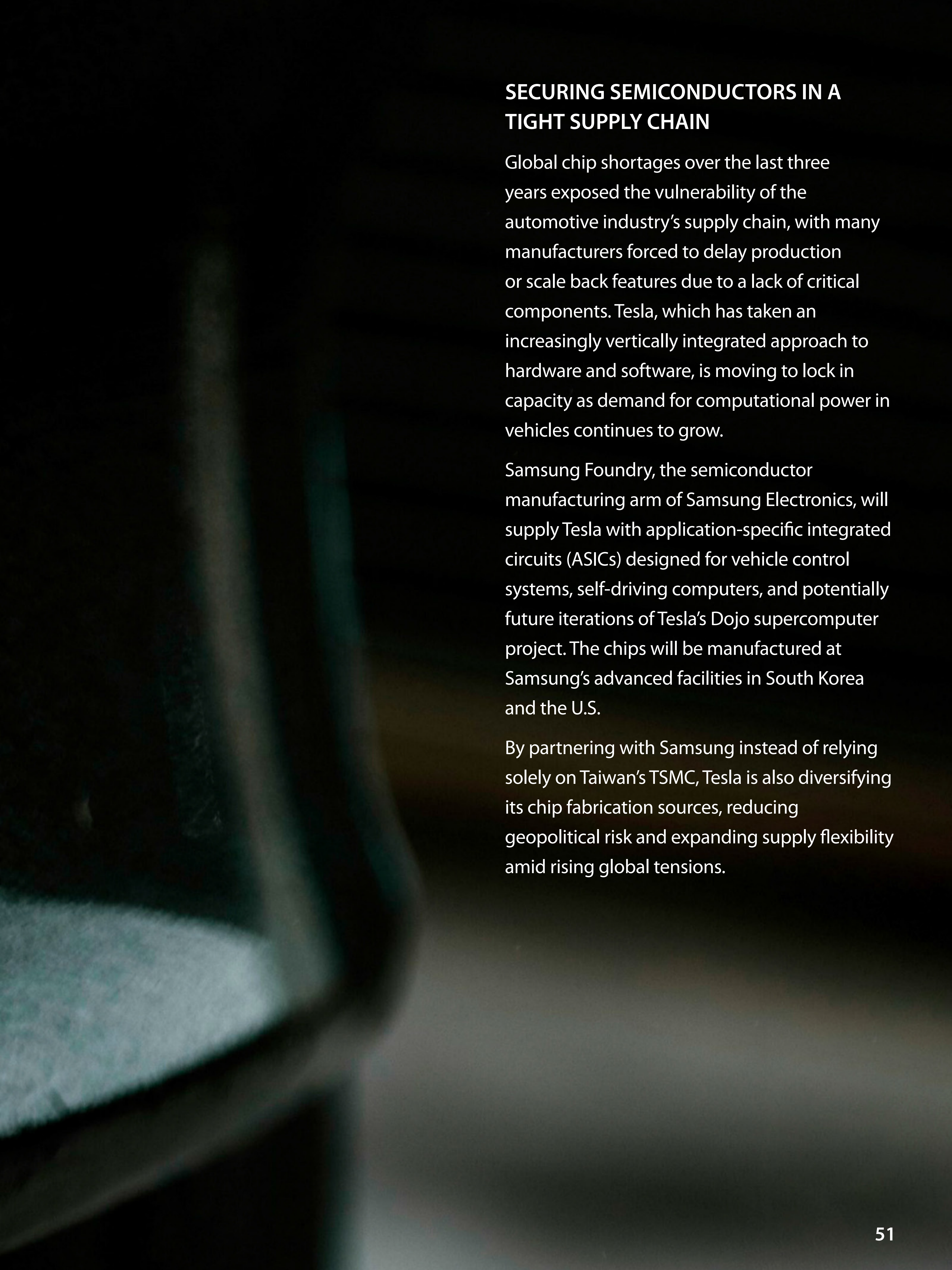
TESLA SIGNS $16.5 BILLION CHIP SUPPLY DEAL WITH SAMSUNG TO SECURE FUTURE VEHICLE COMPUTING

Tesla has finalized a massive $16.5 billion semiconductor supply agreement with Samsung Electronics, signaling a long-term strategic partnership aimed at securing high-performance chips critical to the future of electric vehicles, full self-driving (FSD), and next-generation infotainment systems. The deal marks one of the largest automotive chip supply contracts to date and highlights the increasing convergence between EV manufacturing and advanced computing.

The multi-year agreement will see Samsung produce Tesla's custom-designed chips using advanced 4-nanometer and 5-nanometer fabrication processes, making it a cornerstone of Tesla's roadmap for smarter, more autonomous vehicles. The deal underscores how chip manufacturing capacity has become a central focus for automakers seeking to stay competitive in the AI-powered vehicle era.

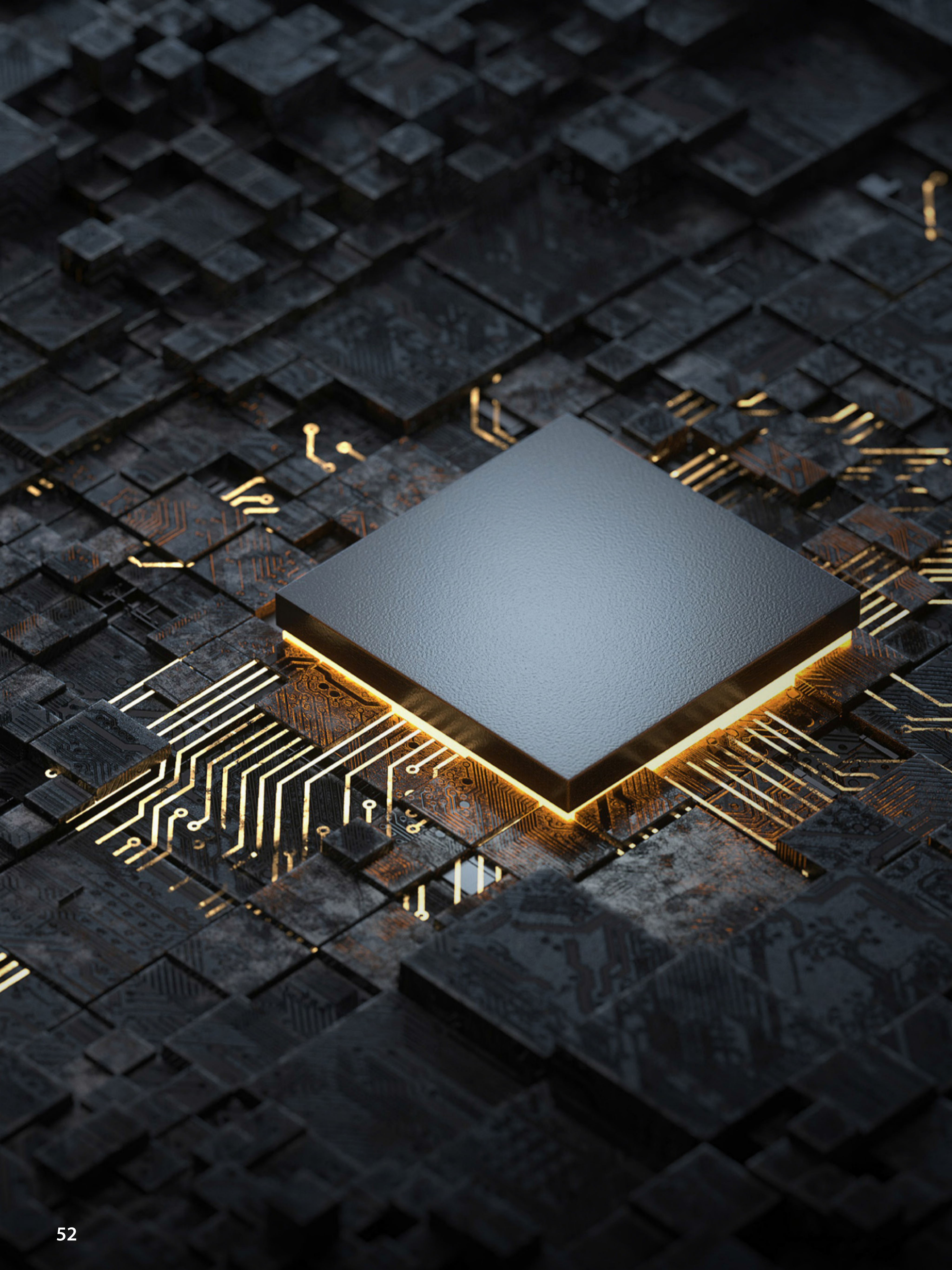


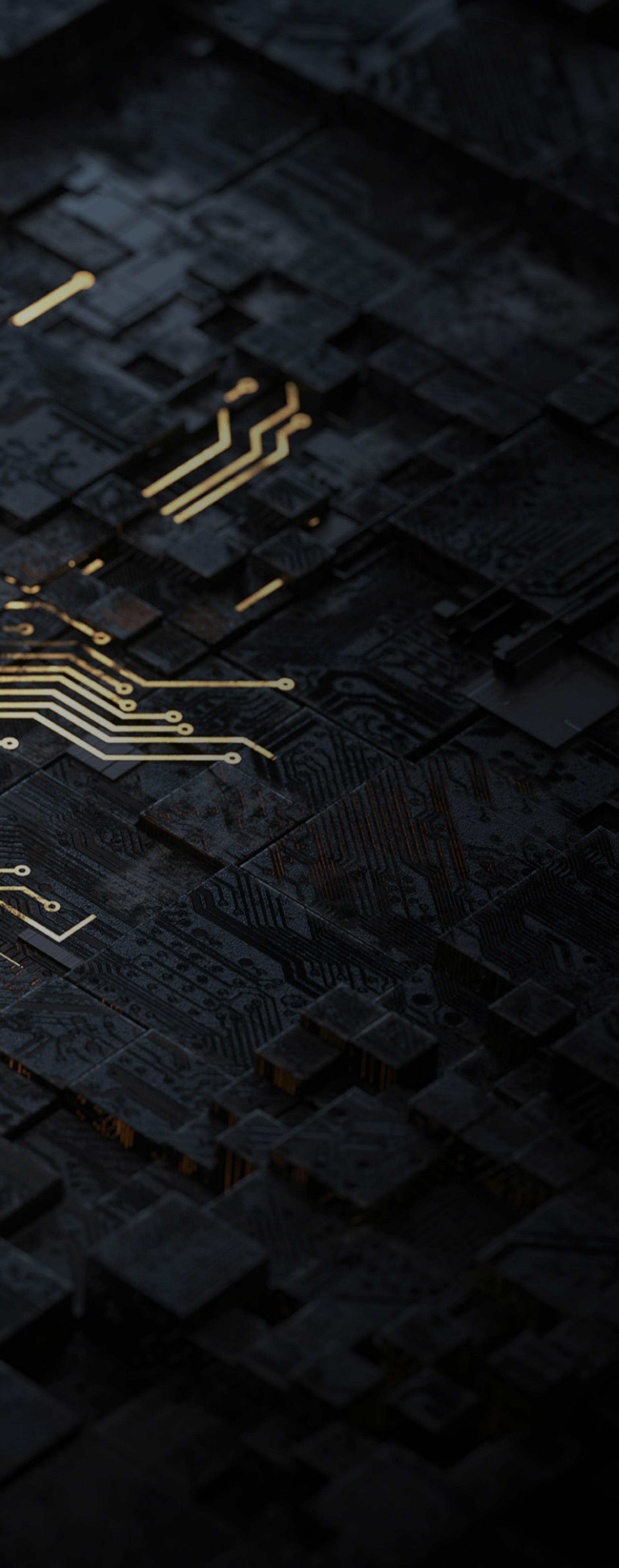
SECURING SEMICONDUCTORS IN A TIGHT SUPPLY CHAIN

Global chip shortages over the last three years exposed the vulnerability of the automotive industry's supply chain, with many manufacturers forced to delay production or scale back features due to a lack of critical components. Tesla, which has taken an increasingly vertically integrated approach to hardware and software, is moving to lock in capacity as demand for computational power in vehicles continues to grow.

Samsung Foundry, the semiconductor manufacturing arm of Samsung Electronics, will supply Tesla with application-specific integrated circuits (ASICs) designed for vehicle control systems, self-driving computers, and potentially future iterations of Tesla's Dojo supercomputer project. The chips will be manufactured at Samsung's advanced facilities in South Korea and the U.S.

By partnering with Samsung instead of relying solely on Taiwan's TSMC, Tesla is also diversifying its chip fabrication sources, reducing geopolitical risk and expanding supply flexibility amid rising global tensions.



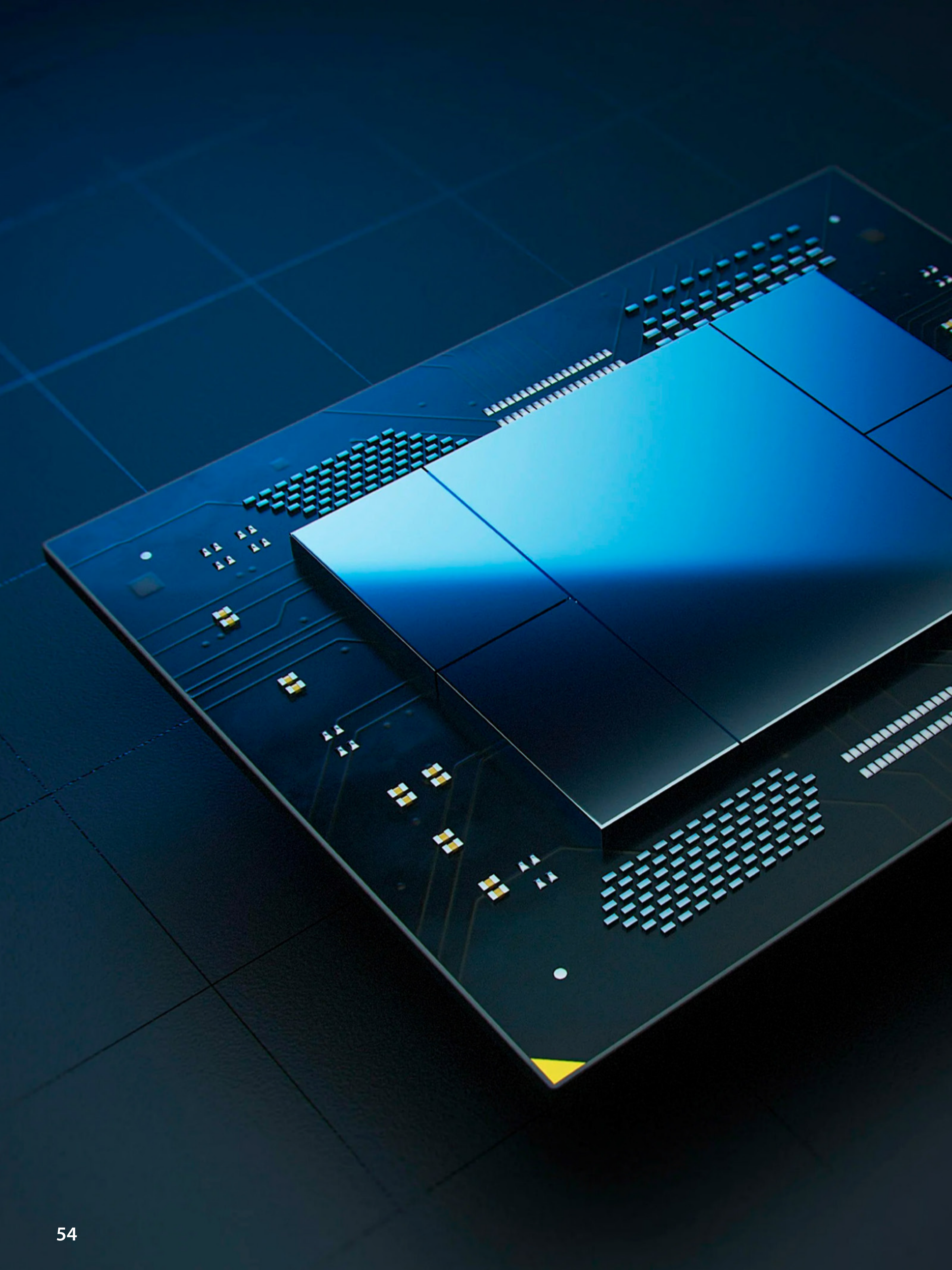


ENABLING NEXT-GENERATION VEHICLE TECHNOLOGY

The chips Samsung will produce are expected to support Tesla's next-gen FSD computers and high-bandwidth data processing systems. These components are essential for enabling real-time sensor fusion, video inference, and neural network acceleration—functions that underpin Tesla's autonomy stack and cabin intelligence systems.

According to semiconductor analysts, using 4nm and 5nm nodes will allow Tesla to significantly increase computational efficiency while minimizing heat and power consumption—key advantages for EV platforms where energy optimization is critical.

Tesla's in-house chip design team, which has developed the FSD chip and custom AI hardware used in the Dojo system, will continue to provide the architecture. Samsung will handle physical manufacturing, testing, and packaging, ensuring a seamless pipeline from design to integration.



A WIN FOR SAMSUNG IN A HIGH-STAKES FOUNDRY BATTLE

For Samsung, the Tesla deal is a major win in the competitive foundry market, where the company is battling TSMC and Intel Foundry Services for global leadership in contract chip production. Landing a long-term partner like Tesla validates Samsung's investment in advanced process nodes and positions the company as a serious contender in automotive semiconductors.

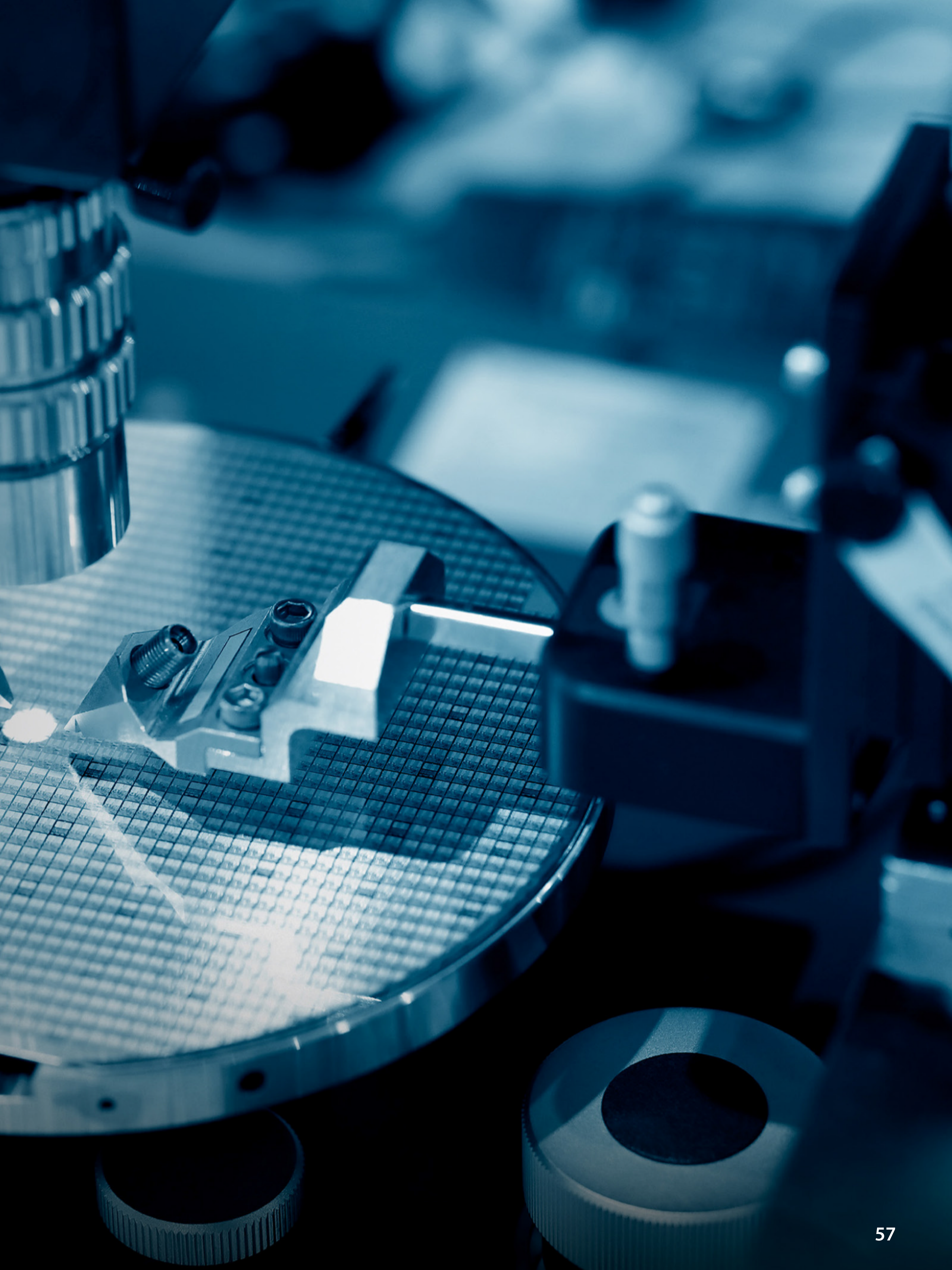
Samsung has been aggressive in courting high-value, non-smartphone clients across automotive, data center, and AI sectors, investing billions in fabrication plants in Texas and South Korea. The Tesla agreement helps solidify Samsung's standing as a trusted partner in complex, mission-critical chip manufacturing—a key differentiator in an industry where reliability and scalability are paramount.

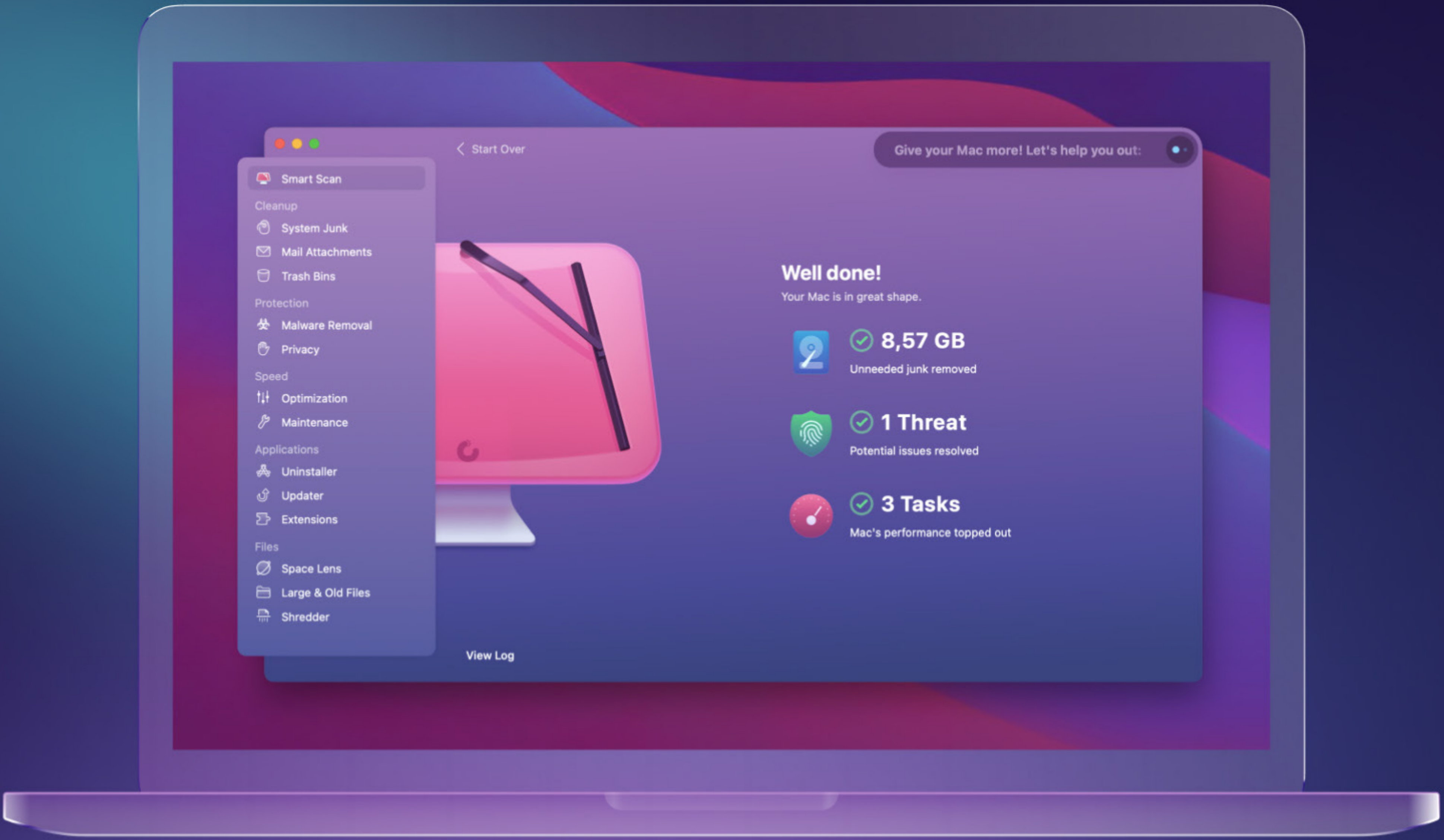
CAUTION
overtightening
will damage cables

ALIGNING WITH TESLA'S FUTURE PLATFORM STRATEGY

The chip supply deal also supports Tesla's broader platform strategy, which includes not just cars but energy systems, AI training infrastructure, and possibly consumer hardware. With the upcoming launch of Robotaxi, a redesigned Model 2 platform, and continued expansion of FSD capabilities, Tesla's demand for proprietary, high-performance chips is set to increase sharply through the end of the decade.

Locking in semiconductor supply through 2030 gives Tesla a clear runway for scaling vehicle production, improving autonomy, and reducing its dependence on off-the-shelf silicon—especially as other automakers race to build or source their own AI hardware stacks.




Start Over
Give your Mac more! Let's help you out:
Smart Scan
Cleanup
System Junk
Mail Attachments
Trash Bins
Protection
Malware Removal
Privacy
Speed
Optimization
Maintenance
Applications
Uninstaller
Updater
Extensions
Files
Space Lens
Large & Old Files
Shredder
Well done!
Your Mac is in great shape.
8,57 GB
Unneeded junk removed
1 Threat
Potential issues resolved
3 Tasks
Mac's performance topped out
View Log

CleanMyMac X

Your Mac.
As good as new.

Learn More

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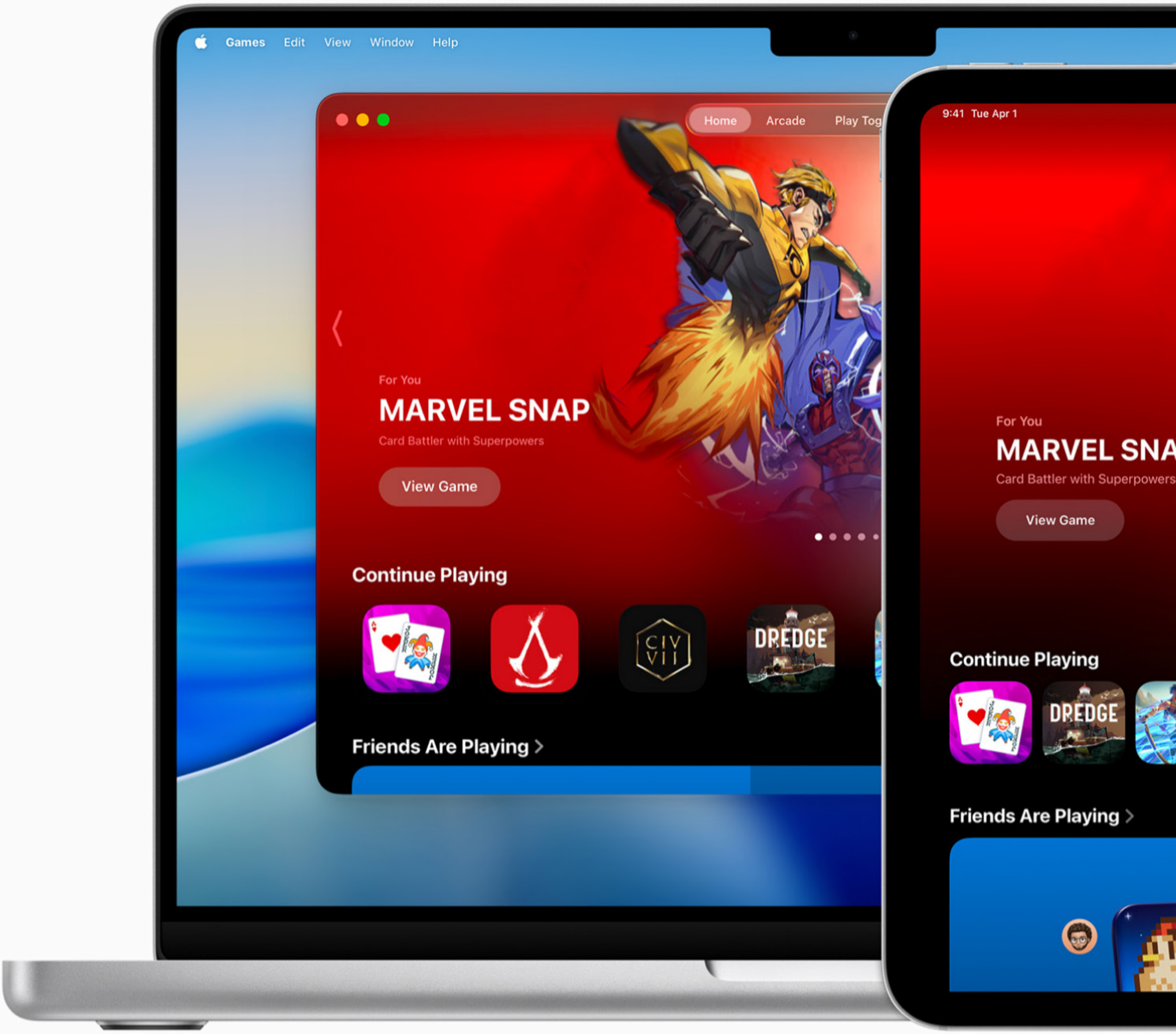
The only VPN you'll ever need
Get ClearVPN

Games

A UNIFIED EXPERIENCE FOR GAMING ACROSS THE ECOSYSTEM


Games
Edit
View
Window
Help
Home
Arcade
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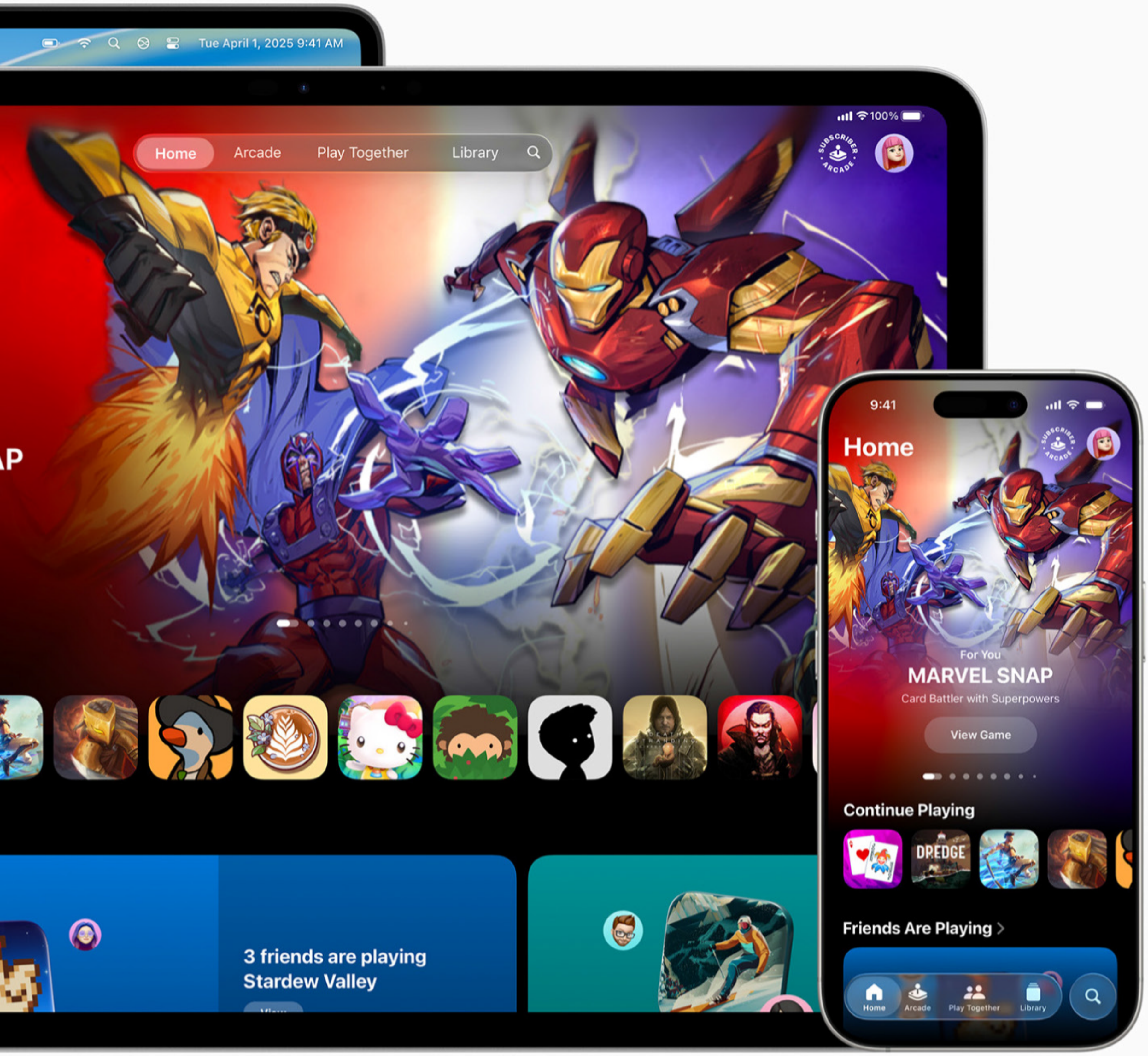
For You
MARVEL SNAP
Card Battler with Superpowers
View Game
Continue Playing
DREDGE
Friends Are Playing
9:41 Tue Apr 1
For You
MARVEL SNA
Card Battler with Superpowers
View Game
Continue Playing
DREDGE
Friends Are Playing

At this year's WWDC, Apple unveiled a new addition to its ecosystem: an official Apple Games app. The platform, set to launch with iOS 26, iPadOS 26, and macOS Tahoe 26 this fall, promises to redefine how players discover, play, and connect through games.


Tue April 1, 2025 9:41 AM
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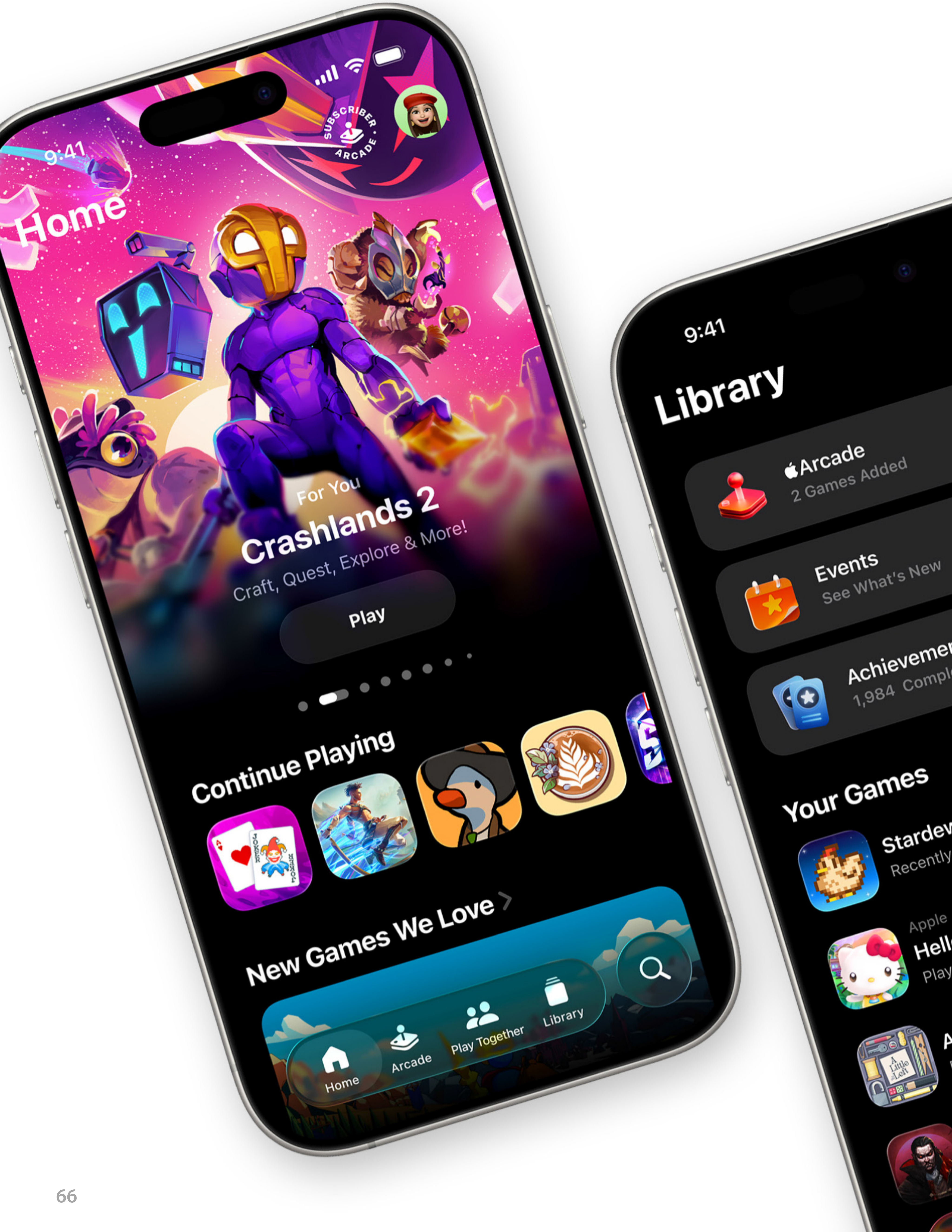
Home
Arcade
Play Together
Library
SUBSCRIBER · ARCADE ·
3 friends are playing Stardew Valley
9:41
Home
For You
MARVEL SNAP
Card Battler with Superpowers
View Game
Continue Playing
DREDGE
Friends Are Playing
Home
Arcade
Play Together
Library

CRASH

LANDS2


9:41
SUBSCRIBER · ARCADE
Home
For You
Crashlands 2
Craft, Quest, Explore & More!
Play
Continue Playing
New Games We Love >
Home
Arcade
Play Together
Library
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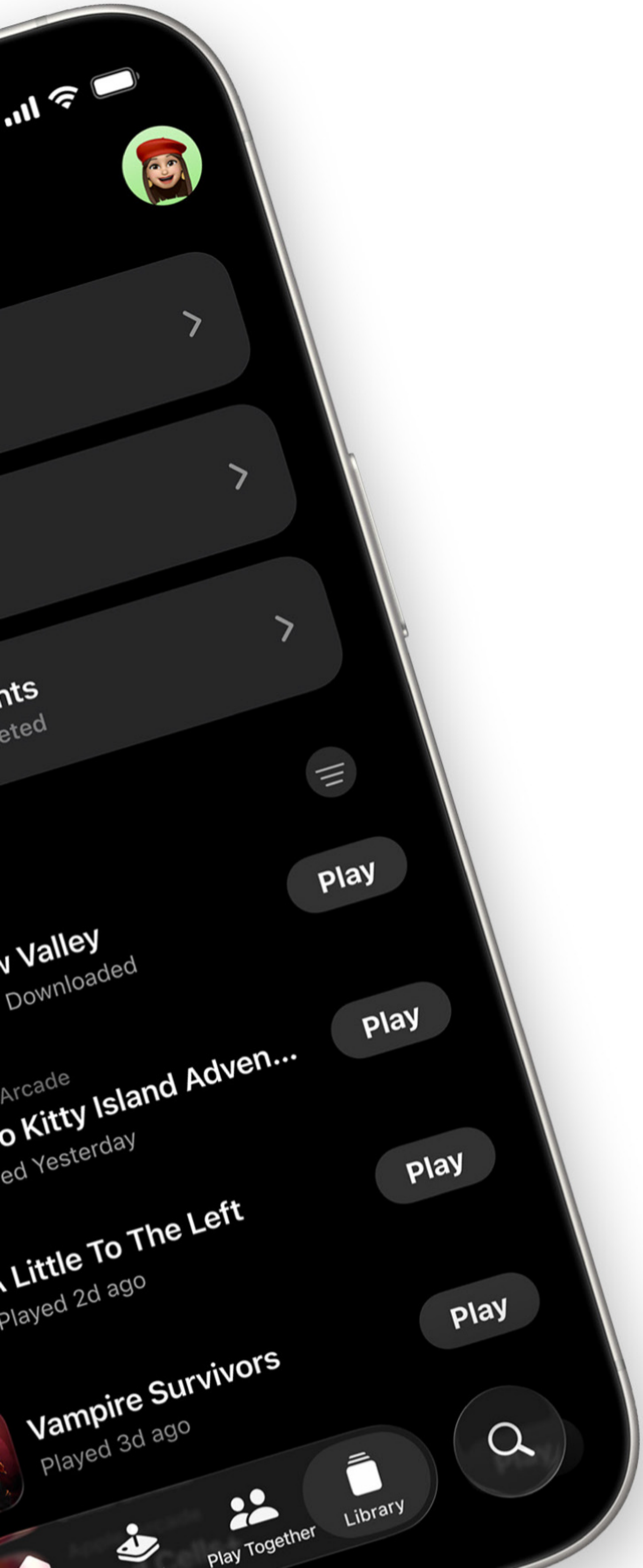


A UNIFIED EXPERIENCE

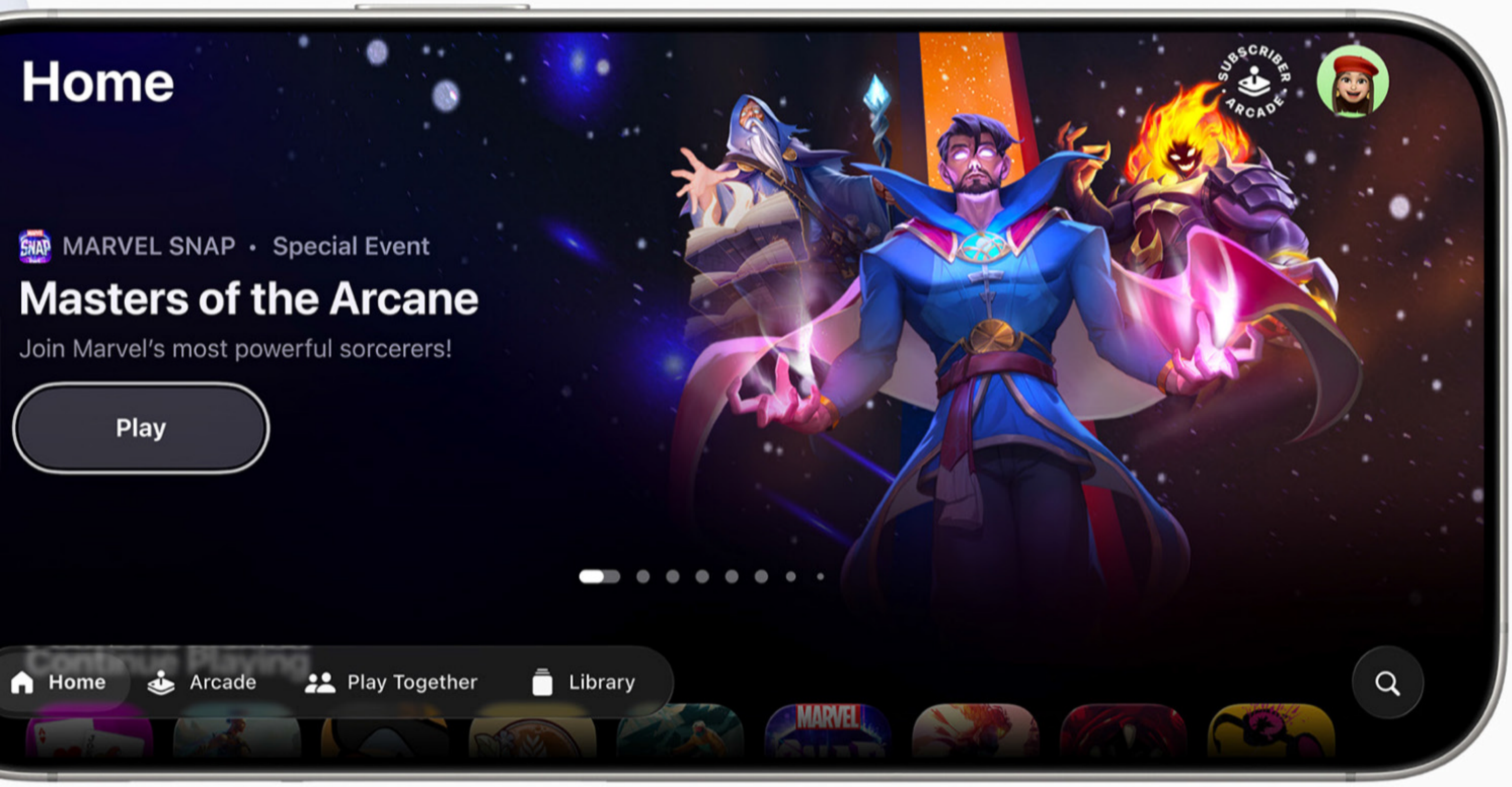
Designed as a centralized hub for gaming, the Apple Games app integrates personalized recommendations, social features, and seamless access to both App Store titles and Apple Arcade's expansive catalog. With its focus on community, competition, and discovery, the app is poised to become the ultimate destination for gamers, from casual players to dedicated enthusiasts. The Apple Games app is built to simplify and enhance the gaming experience across Apple's platforms. For years, players have relied on the App Store to find and download games, but the Games app takes this a step further by offering a dedicated space tailored specifically for gaming. Whether you're launching a favorite title, rediscovering an old gem, or exploring something new, the app brings everything into an intuitive interface.

One of the app's standout features is its ability to aggregate every game a user has ever downloaded from the App Store for iPhone and iPad, as well as all games installed on a Mac, regardless of their source. This comprehensive library ensures that players can easily access their entire gaming history without having to sift through multiple platforms. For those who prefer physical controls, the app supports compatible game controllers, allowing for seamless navigation and instant game launches. The app's Home tab serves as the heart of the experience, offering a dynamic mix of recently played games, top charts, in-app events, personalized recommendations, and curated editorial collections. These collections highlight some of the App Store's

most exciting titles, such as Balatro, Crashlands 2, and **DREDGE**, ensuring players are always in the loop about trending games. For **Apple Arcade subscribers,** the Arcade tab provides access to over 200 award-winning titles, including family-friendly favorites like Hello Kitty Island Adventure, Sneaky Sasquatch, and **Mini Motorways.** The Library tab, meanwhile, makes it easy to jump back into installed games or redownload past favorites, while the Search tab offers curated collections and charts to help players find their next obsession.

PERSONALIZED

What sets the Apple Games app apart is its emphasis on personalization. By leveraging data about the games you've played and those your friends are enjoying, the app delivers tailored recommendations that feel uniquely suited to your tastes. This social integration is a game-changer, as it allows players to discover new titles based on their friends' activity, fostering a sense of community even in single-player experiences. For developers, this presents an unprecedented opportunity to reach new audiences. As Zach Gage, indie developer and cofounder of Puzzmo, noted, "As my friends have grown up and moved away, I miss hearing about what they're playing on their phones, and the Games app is a great way I can get a window back into their gaming worlds." By showcasing games in social recommendations, top charts, and editorial picks, the app ensures that both new releases and hidden gems gain visibility. Games that incorporate Game Center features, such as leaderboards, achievements, and challenges,



Home
SUBSCRIBER ARCADE
MARVEL SNAP • Special Event

Masters of the Arcane

Join Marvel's most powerful sorcerers!

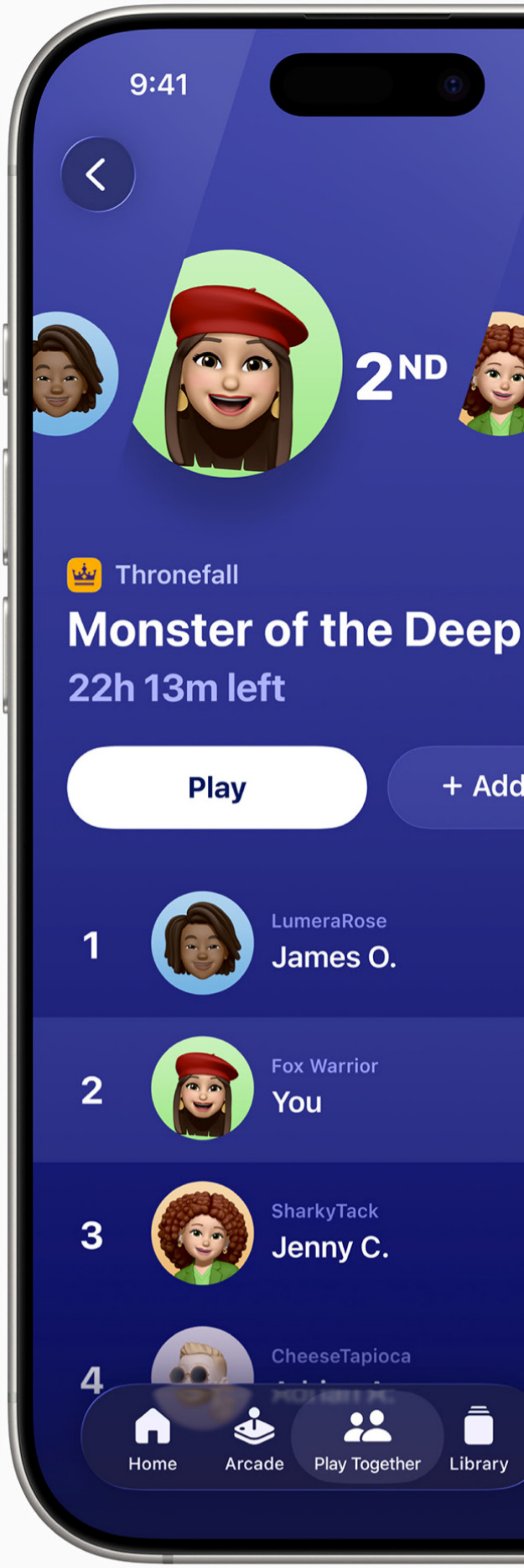
Play
Continue Playing
Home
Arcade
Play Together
Library
MARVEL

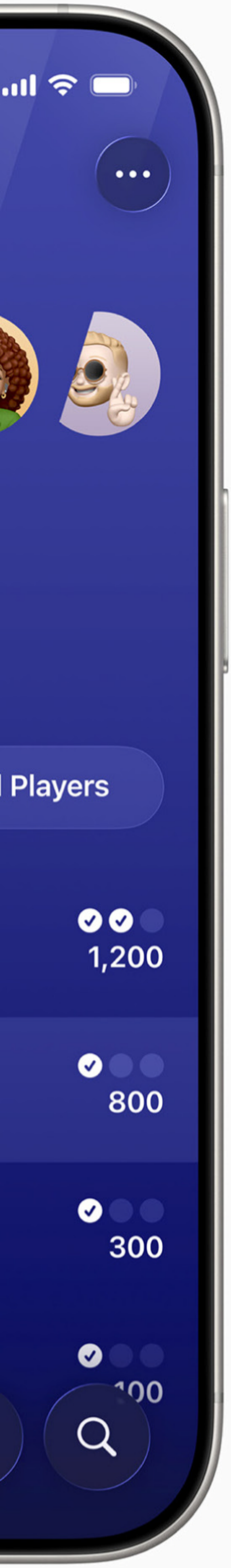
are prominently featured, encouraging deeper engagement and re-engagement from players.

In-app events are another key component of the Games app's discovery ecosystem. These timely events (such as competitions or special updates) are highlighted on the Home tab, game pages, and in search results, keeping players informed about the latest developments in their favorite titles. For developers, this means a powerful tool to showcase new content and rekindle interest among current and former players, even if they've uninstalled the game.

The Apple Games app introduces a suite of social features that transform gaming into a shared experience. The **Play Together tab** serves as the social hub of the app, consolidating all your Game Center friends and groups into one convenient location. Here, players can view their shared gaming history, compare achievements, and invite friends to join multiplayer matches or challenges with just a few taps. Invite links and party codes can be shared via any messaging app, making it effortless to rally friends for a quick match.

The introduction of challenges is one of the app's most exciting innovations. These score-based competitions allow players to turn single-player games into social experiences by inviting friends to compete for the highest score or to achieve specific goals. For example, players can challenge each other to survive the most waves in Thronefall or rack up the highest score in Skate City: New York's weekly featured course. As **Glib Platonov, cofounder of Doghowl Games,** put it, "The introduction of challenges and a new social layer marks a





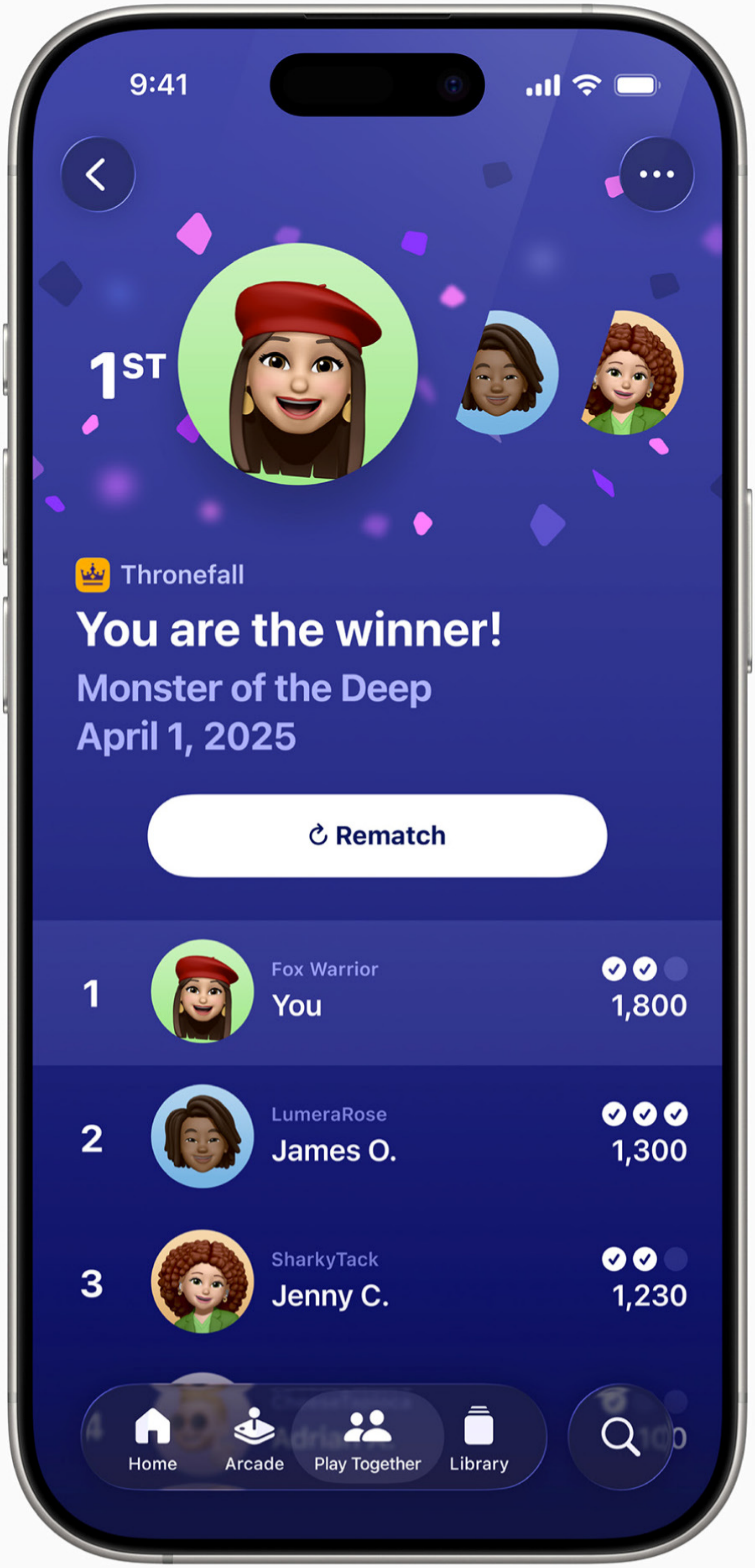
Players

1,200

800

300

100



9:41

1ST

Thronefall

You are the winner!

Monster of the Deep

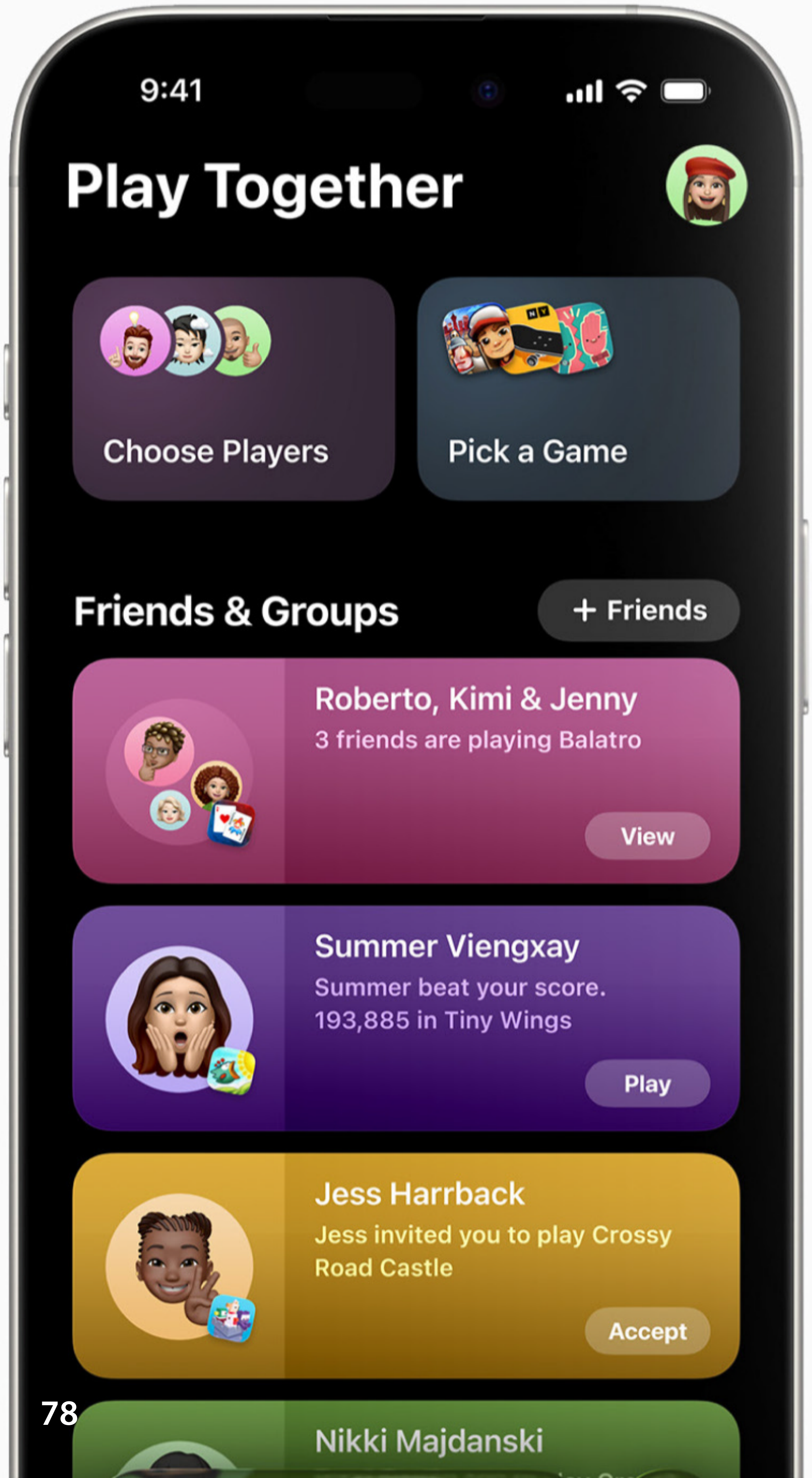
April 1, 2025

Rematch

1	Fox Warrior You	✓ ✓ ○	1,800
2	LumeraRose James O.	✓ ✓ ✓	1,300
3	SharkyTack Jenny C.	✓ ✓ ○	1,230

Home
Arcade
Play Together
Library

BOY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Play Together

Choose Players
Pick a Game

Friends & Groups

+ Friends

Roberto, Kimi & Jenny
3 friends are playing Balatro

View

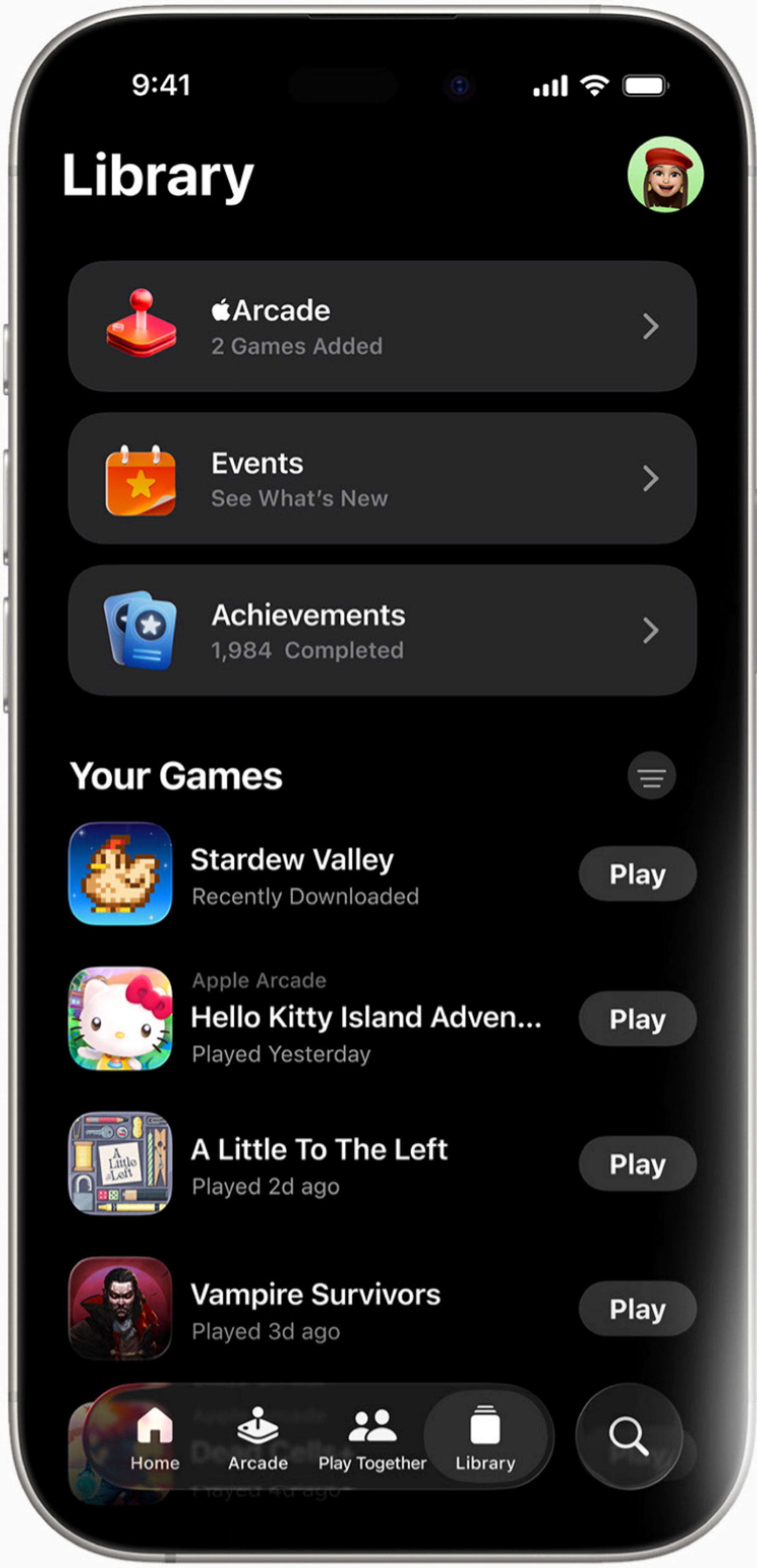
Summer Viengxay
Summer beat your score.
193,885 in Tiny Wings

Play

Jess Harrback
Jess invited you to play Crossy Road Castle

Accept

Nikki Majdanski


9:41

Library

 Arcade
2 Games Added

Events
See What's New

Achievements
1,984 Completed

Your Games

Stardew Valley
Recently Downloaded

Play

Apple Arcade
Hello Kitty Island Adven...
Played Yesterday

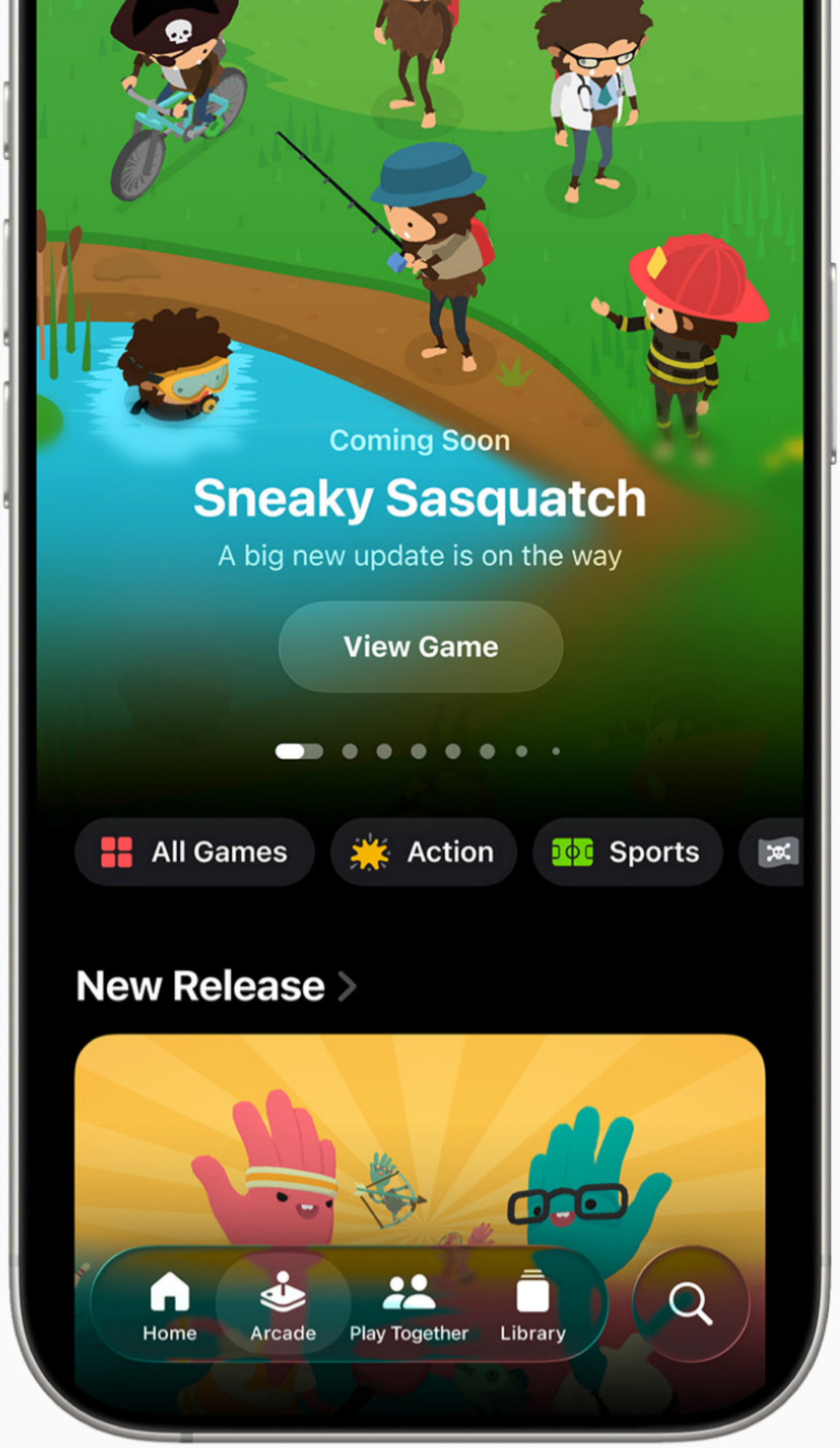
Play

A Little To The Left
Played 2d ago

Play

Vampire Survivors
Played 3d ago

Play
Home
Arcade
Play Together
Library



major leap forward for both developers and players." These challenges not only deepen engagement but also add a layer of friendly competition that keeps players coming back for rematches. Tim Garbos, creative director and cofounder of **Triband,** echoed this sentiment, stating, "The Games app is going to be a game changer for playing on iPhone, iPad, and Mac. The app makes it easy for us to create moments just for groups of friends." The seamless integration of social features into games like **Triband's WHAT THE CLASH?** on Apple Arcade highlights the app's potential to foster community and connection.

GAME CENTER

The Games app is tightly integrated with Game Center, Apple's platform for social gaming features like achievements, leaderboards, and multiplayer activities. By initializing Game Center, developers can ensure that players are automatically signed in and can access their game's activity across all their Apple devices. This connectivity allows games to appear in social recommendations, the Top Played chart, and other prominent placements within the Games app and App Store. Developers can further enhance their games with Game Center features to maximize discovery and engagement. Leaderboards encourage friendly competition by notifying players when a friend surpasses their score, prompting them to return to the game and strive for a higher score. Achievements motivate players to unlock new milestones and track their progress, while multiplayer activities make it easy to invite friends to join, even across different platforms.

WHAT
CLA

THE
ASH?

For games with multiplayer systems, Games provides infrastructure to promote seamless experiences, ensuring smooth integration into the app's framework.

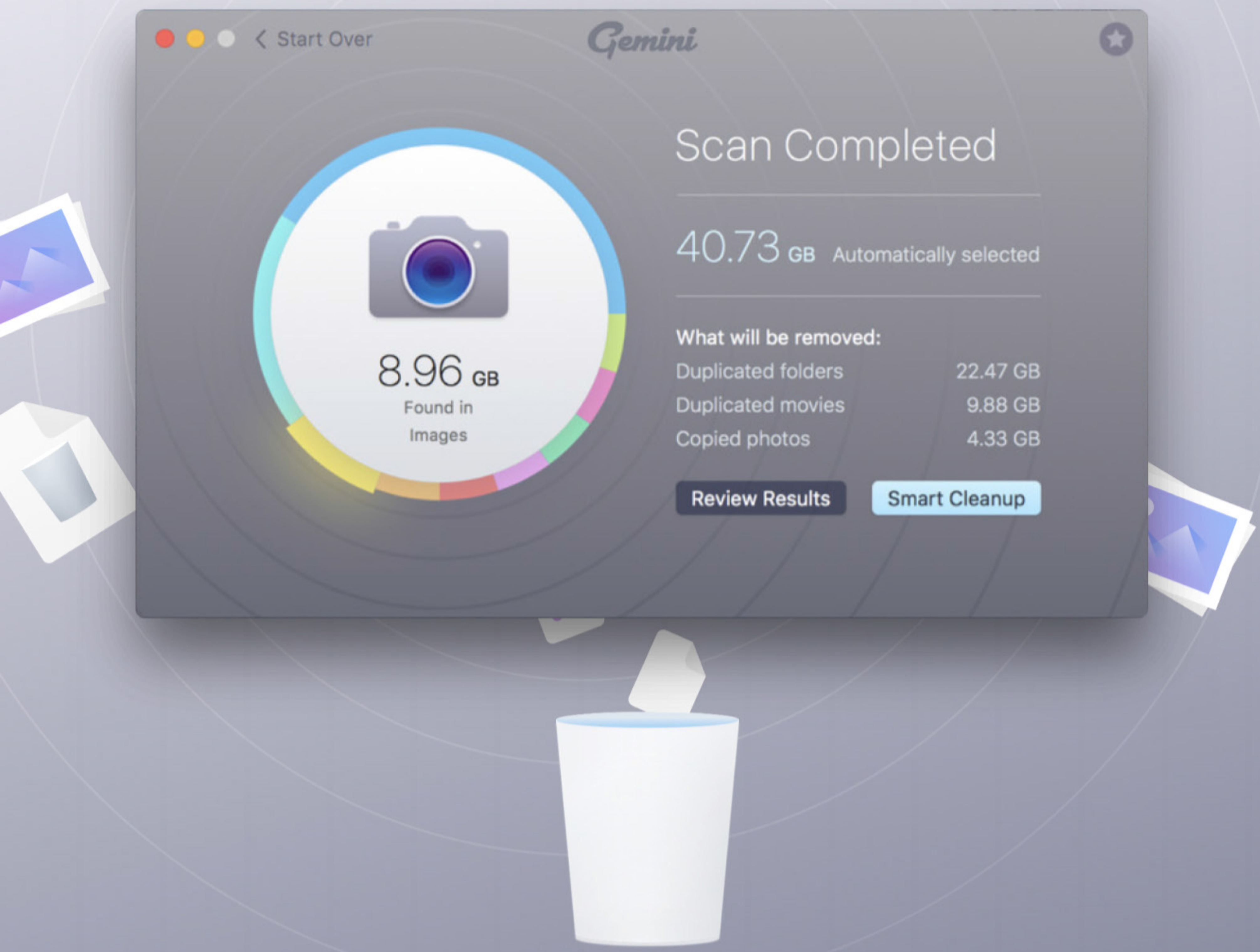
For Apple Arcade subscribers, the Games app serves as the ultimate gateway to the service's catalog of over 200 high-quality, family-friendly games. The Arcade tab curates the best titles, highlights new releases, and helps subscribers maximize their subscription benefits. Whether you're exploring the whimsical world of Hello Kitty Island Adventure or strategizing in Mini Motorways, the Games app ensures that Apple Arcade's offerings are front and center. The app's integration with Apple Arcade also benefits developers, as their games can appear in curated collections and recommendations tailored to subscribers. This increased visibility, combined with the app's social features, creates a virtuous cycle of discovery, engagement, and community-building.

The Apple Games app is currently available for testing through the Apple Developer Program, with a **public beta now available via the Apple Beta Software Program.** The app will be released as a free software update with iOS 26, iPadOS 26, and macOS Tahoe 26 this fall.

steelseries

STARDEW
VALLEY
Y
X
B
A

For players, the Games app represents a new era of gaming on Apple devices, one where discovery, competition, and connection are seamlessly intertwined. We can't wait to play on!


Start Over
Gemini
Review Results
Smart Cleanup

Scan Completed

40.73 GB Automatically selected

8.96 GB Found in Images

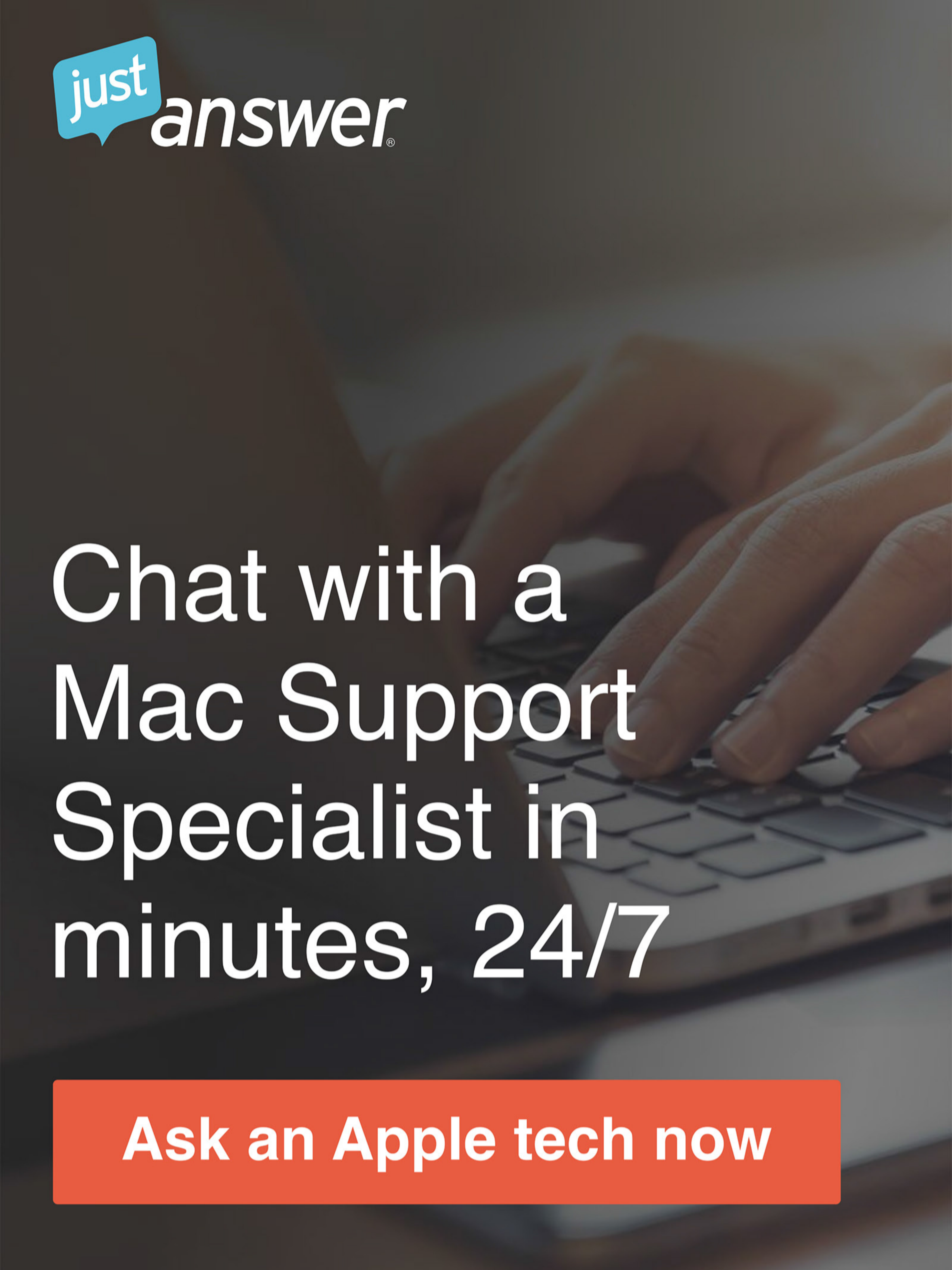
What will be removed:

Duplicated folders	22.47 GB
Duplicated movies	9.88 GB
Copied photos	4.33 GB

Gemini 2

The intelligent duplicate file finder

Learn more >



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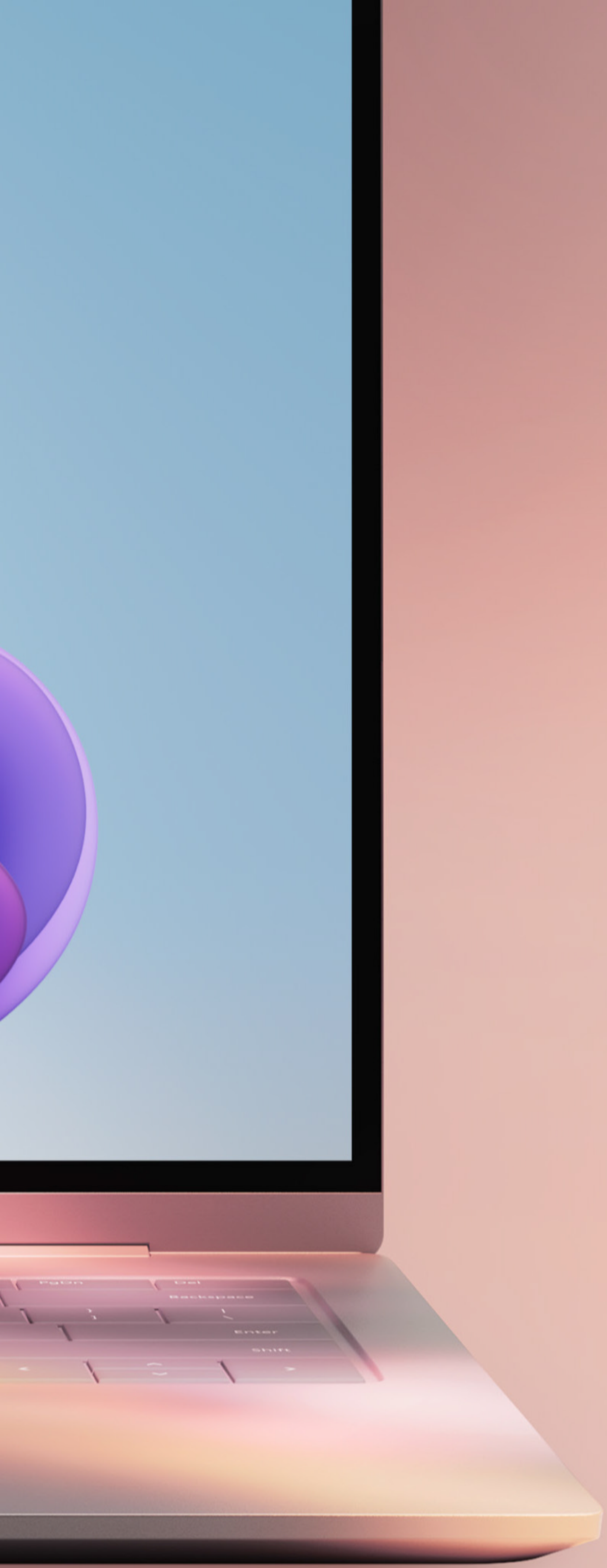
MICROSOFT LAUNCHES EDGE COPILOT MODE AS AI COMES TO THE BROWSER FRONTLINE

Microsoft is rolling out a new Copilot mode in its Edge browser, marking the latest step in the company's mission to bring generative AI directly into everyday user workflows. The update adds a powerful AI assistant into the browser sidebar, enabling real-time summaries, writing assistance, web search enhancements, and contextual content generation—all powered by OpenAI's models running on Microsoft's Azure infrastructure.

Calculator
Wed
Thu
33°
34°
26°
27°
Microsoft Edge
Bangkok



With this move, Microsoft becomes the latest major tech player to bring AI deeper into the web browsing experience, following similar initiatives by Google with its Gemini-powered Chrome experiments and Arc's browser-integrated AI tools. But with Edge Copilot, Microsoft is uniquely positioned to capitalize on its full-stack advantage across operating systems, productivity software, and enterprise cloud.

EDGE COPILOT MODE: WHAT IT DOES

Edge Copilot is more than a chatbot—it acts as an AI co-navigator, offering users tailored suggestions, instant webpage analysis, email and document drafting, and even real-time comparisons when shopping online. Users can ask Copilot to summarize long articles, rewrite paragraphs, explain unfamiliar terms, or compare products based on live page data.

The assistant can also tap into Microsoft 365 services for enterprise users, giving it access to work content such as emails, Teams chats, and files (if permissions are granted), enabling context-aware productivity within the browser environment. It uses Microsoft's orchestration of GPT-4 and proprietary models to adjust tone, summarize content, or generate entirely new copy depending on the prompt.

The Copilot icon is now built into the browser's sidebar across Windows and macOS, and will gradually roll out to Edge on mobile. Users can activate it manually or enable automatic prompts on select websites that support enhanced interactions.

BROWSERS BECOME THE NEXT AI BATTLEGROUND

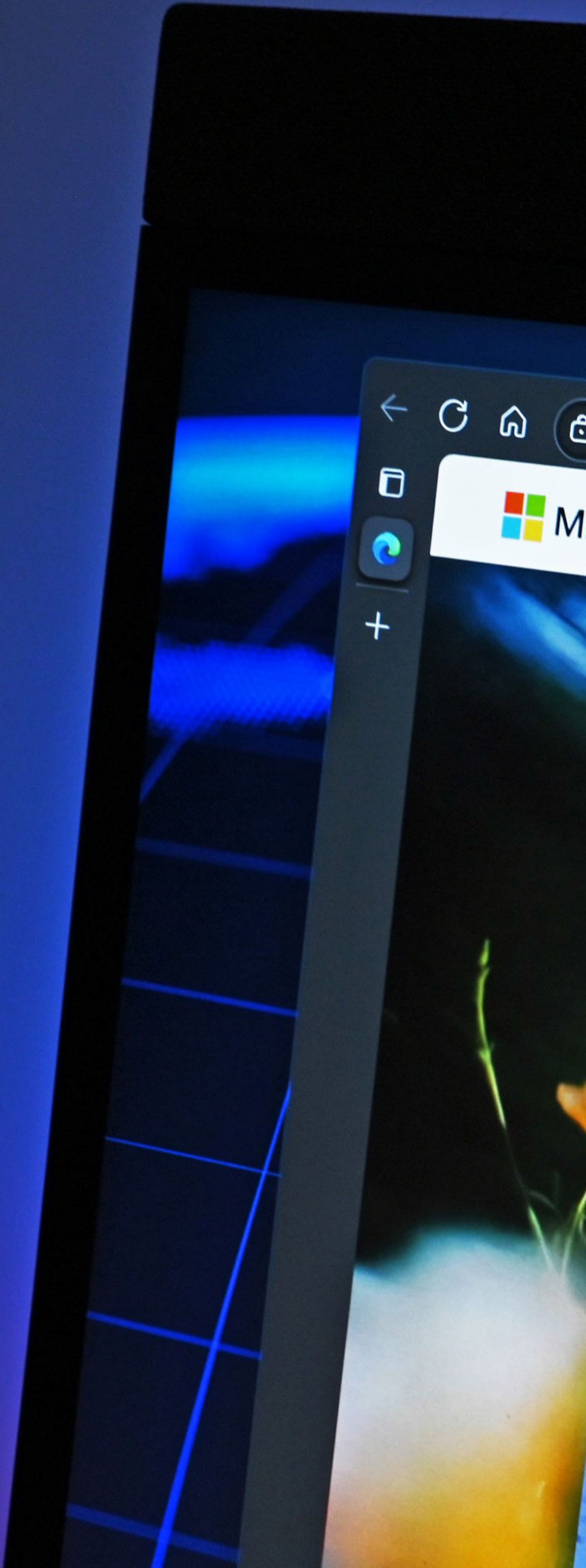
Edge Copilot's release underscores a growing shift: browsers are becoming AI-native platforms, not just passive tools for rendering web pages. With more users living inside web apps—from documents to social platforms to video calls—browser-based assistants are increasingly being seen as the next logical surface for generative AI adoption.

Google's Gemini is already integrated into experimental versions of Chrome, offering similar summarization and assistant functions, while upstarts like Arc Browser have built AI directly into their navigation experience. Opera and Brave have also launched AI-powered features in recent months.

But Microsoft has one major edge: its integration across the Windows OS, Bing search, and Microsoft 365 productivity suite. With Edge now shipping as the default browser in Windows 11, and with Copilot tightly embedded across platforms, Microsoft is betting that contextual assistance within the browser will give it a functional and strategic advantage over rivals.

POSITIONING FOR ENTERPRISE AND CONSUMER USERS

While Edge Copilot is available to all users, its enterprise value proposition is what sets it apart. By integrating AI into the same environment where workers view dashboards, manage CRM tools, or collaborate in Microsoft Teams, Microsoft is hoping to make AI not just a tool—but a constant background assistant.



https://www.mi...
icrosoft
Copilot Mode

Microsoft Edge

Your AI-powered browser

Introducing Copilot Mode in Edge, our next step towards building a more powerful way to pilot the web.

You're in Copilot Mode

Image: Future | Daniel Rubino

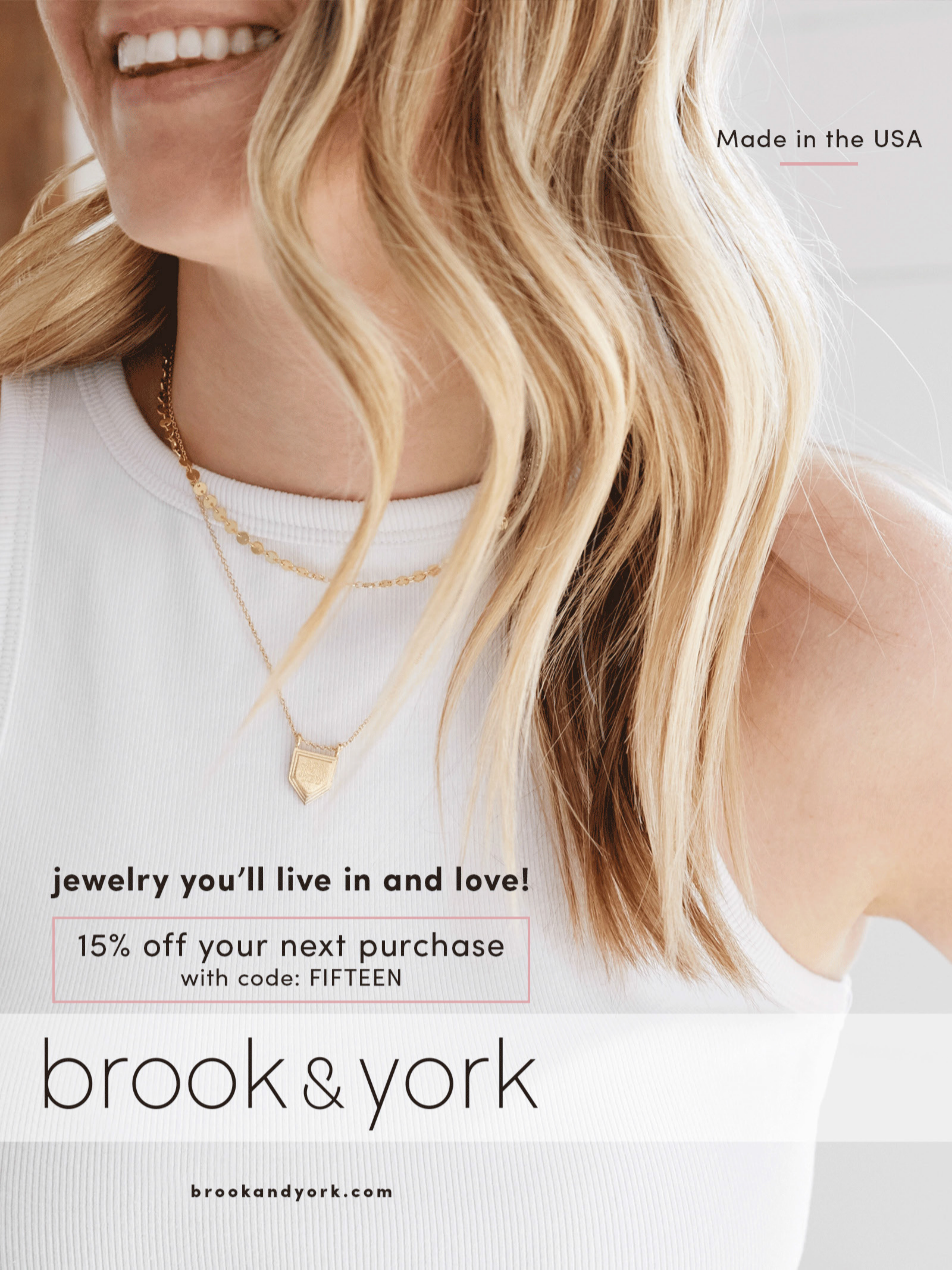
For consumers, features like web summarization, smart search suggestions, grammar corrections, and instant answers add convenience in daily browsing. Edge Copilot also supports code explanation and generation, helping developers understand code snippets or generate alternatives directly within browser-based IDEs and tools like GitHub.

The system can reference previous prompts, learn from session context, and adjust tone or format to fit a user's goal, offering a customizable AI layer on top of standard web browsing.

MOVING FROM SEARCH TO ASSISTANCE

Edge Copilot is a key part of Microsoft's broader shift away from traditional search toward AI-based assistance. This transformation began with the launch of Bing Chat in early 2023 and continued with Copilot integrations across Windows and Microsoft 365. The browser now acts as a cross-section of web navigation and AI interaction, blending information retrieval with AI-generated content.

Microsoft says Edge Copilot will continue to evolve, with future updates planned for multimodal input, improved integration with third-party tools, and more advanced memory features that will allow it to retain user preferences and project history over time.



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APPLE TO OPEN MANUFACTURING ACADEMY IN DETROIT AS IT INVESTS IN U.S. TALENT

Apple is launching a new Manufacturing Academy in Detroit, a move aimed at building a skilled U.S. workforce for advanced manufacturing and supporting its broader domestic investment strategy. While the initiative signals Apple's growing interest in nurturing American talent, the company made it clear: don't expect iPhones to be made in the U.S. anytime soon.

The new academy, which will open in 2026, is part of Apple's $100 million commitment to workforce development through its Racial Equity and Justice Initiative (REJI). It will train students and mid-career workers in precision manufacturing, hardware assembly, robotics, and process engineering, with the goal of preparing them for careers in Apple's supplier network and broader advanced manufacturing sectors.

EDUCATION AND JOBS

Despite its high-profile U.S. training investment, Apple has no immediate plans to shift core iPhone production to American soil. Manufacturing executives at the company reiterated that the global supply chain efficiency, cost structure, and specialized labor force available in Asia remain unmatched—particularly in regions like China, Vietnam, and India, where Apple already has significant assembly and component operations.

The Detroit Manufacturing Academy won't build Apple products directly. Instead, it will function as a training pipelineto support domestic roles in prototyping, component testing, materials development, and smaller-scale Apple-related manufacturing that supports product research or localized parts production.

The program is being developed in partnership with local educational institutions and workforce development boards. Apple says it will offer certifications, apprenticeships, and pathways to full-time roles with Apple suppliers, especially in Michigan's automotive-influenced tech corridor.

A SIGNAL TO WASHINGTON AMID U.S. INDUSTRIAL POLICY SHIFT

Apple's Detroit initiative comes as the U.S. government accelerates funding for domestic manufacturing through legislation like the CHIPS and Science Act and the Inflation Reduction Act. While Apple hasn't applied for CHIPS Act subsidies directly related to smartphone production, it has expressed support for domestic semiconductor R&D and maintains close relationships with U.S. suppliers like Corning and II-VI (now Coherent).

The academy serves as a visible example of Apple aligning with U.S. industrial goals without disrupting its global production footprint. It could also help the company hedge against future policy shifts that might tie federal incentives to domestic employment or training contributions.

NO IPHONE MADE IN USA—YET

Though the idea of a U.S.-made iPhone remains appealing in political and economic rhetoric, analysts and supply chain experts say it's unlikely without decades of infrastructure buildout and major cost trade-offs. China's manufacturing ecosystem offers deep specialization, 24/7 turnaround capability, and unmatched scalability—all of which would be extremely difficult to replicate in the U.S.

CHEVROLET
meijer
meijer ENTRY

Instead, Apple is doubling down on its "Designed in California, Assembled Globally" model while expanding domestic contributions in areas like chip packaging, display technology, and advanced materials. TSMC's Arizona chip fabrication plant—set to produce Apple-related silicon by 2027—is one such example of this hybrid approach.

INVESTING IN DOMESTIC SKILLS AND EQUITY

The Detroit Manufacturing Academy isn't just about supply chains—it's also a statement on equity. Apple's REJI program focuses on closing opportunity gaps for historically marginalized communities, and Detroit was chosen for its diverse talent pool and deep manufacturing heritage.

The company said the academy will offer full scholarships for eligible participants and prioritize outreach to underrepresented groups. Graduates will be placed in jobs within Apple's U.S. supplier network or eligible for relocation support in Apple's broader global operations.

While iPhones may not be built in Michigan anytime soon, Apple's investment in workforce development reflects a long-term strategy: building local talent today for global competitiveness tomorrow.

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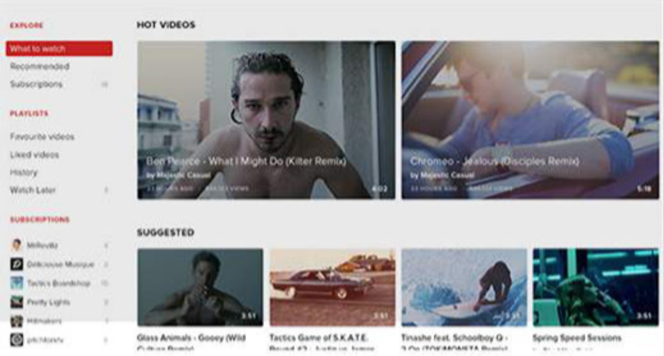

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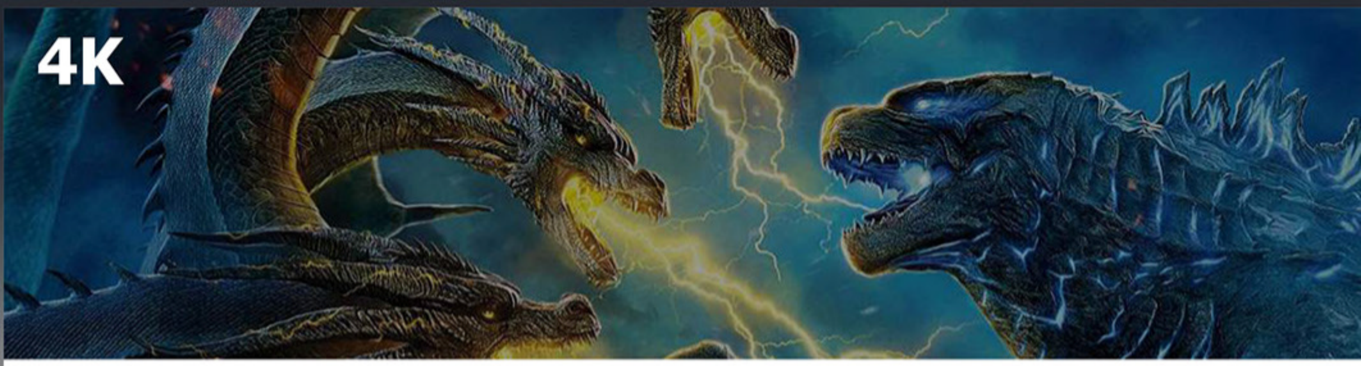

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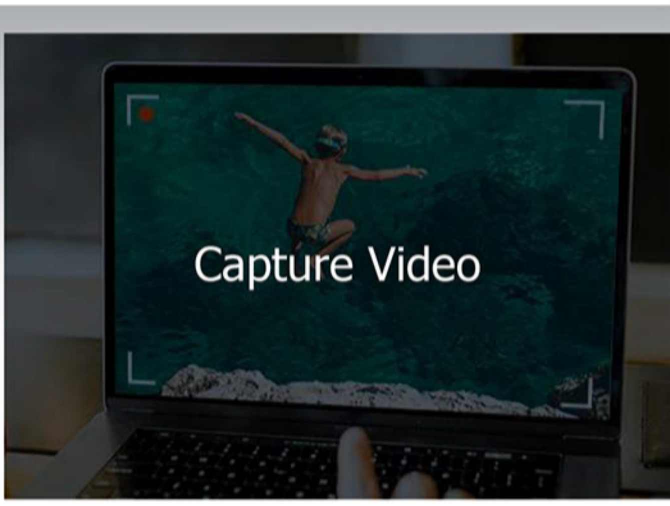

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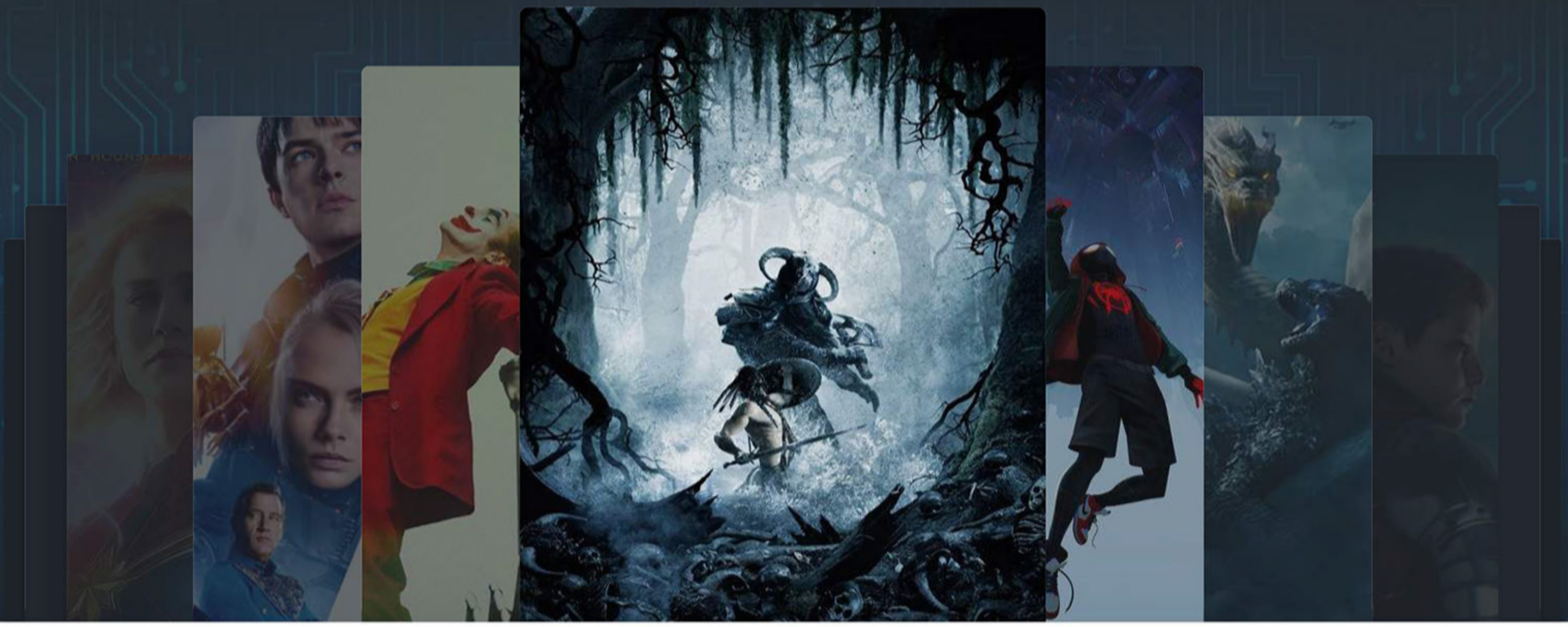

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WAYMO PLANS TO WIDEN ROBOTAXI LEAD OVER TESLA WITH 2026 DALLAS LAUNCH

Waymo, Alphabet’s autonomous driving division, has announced plans to launch its robotaxi service in Dallas by 2026, marking a major expansion in its effort to lead the U.S. autonomous vehicle race ahead of competitors like Tesla. The move is part of a broader growth strategy to scale Waymo’s driverless operations beyond current hubs in Phoenix, San Francisco, and Los Angeles.

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WAYMO
JAGUAR

The decision to enter Dallas—one of the fastest-growing metro areas in the country—underscores Waymo's confidence in its technology stack and its readiness to operate in diverse urban conditions. The Texas expansion is expected to significantly increase the size of Waymo's operational domain and further distance the company from Tesla, whose own robotaxi rollout remains in development with no confirmed citywide deployments.

DALLAS BECOMES A STRATEGIC TESTBED FOR SCALING

Waymo says Dallas was selected for its expanding road network, favorable climate, and tech-friendly regulatory environment. The city's mix of dense urban centers, suburban sprawl, and commercial corridors makes it an ideal candidate to train and test its fifth-generation Waymo Driver across a wide range of real-world conditions.

The company plans to deploy a fleet of fully autonomous electric Jaguar I-PACE vehicles, each equipped with advanced lidar, radar, and camera arrays capable of real-time navigation without human input. By launching in Dallas, Waymo is not only entering a new market but also moving into a geographic region where Tesla maintains a significant operational footprint, including its Gigafactory Texas and upcoming Robotaxi product reveal.

Waymo's early start in the region could serve as a preemptive positioning move to dominate autonomous ride-hailing in Texas before Tesla's still-theoretical service becomes a reality.

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TESLA STILL CHASING A FULL SELF-DRIVING LAUNCH

While Tesla continues to promote its Full Self-Driving (FSD) beta software and promises a dedicated Robotaxi vehicle, the company has yet to demonstrate a fully autonomous, driverless ride-hailing service operating under regulatory approval. Tesla's system remains Level 2 (driver-assist) under SAE standards, while Waymo has already achieved Level 4 autonomy in defined geofenced areas.

Tesla CEO Elon Musk has said that Robotaxi service is a core priority for 2025–2026, with expectations that a purpose-built autonomous vehicle will be unveiled later this year. However, the timeline for regulatory approval, safety validation, and actual fleet deployment remains uncertain. In contrast, Waymo has already logged millions of miles in fully autonomous mode and received commercial permits to operate without a safety driver in several major cities.

This operational lead gives Waymo a critical advantage in both public perception and policymaker trust, especially as cities begin crafting frameworks for robotaxi integration into urban transportation systems.

WAYMO'S REGULATORY EDGE AND SAFETY RECORD

Waymo's methodical approach—prioritizing safety validation, local partnerships, and regulatory cooperation—has given it a solid foundation for scaling across states. The company has spent over a decade developing its autonomy software and sensor hardware in-

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WAYMO

NNUZZO
for WAYMO
Ride today
Ride today

house, allowing for full-stack control that aligns with safety and liability requirements.

In Dallas, Waymo is expected to follow the same deployment playbook used in Phoenix and San Francisco, beginning with employee-only rides, then gradually expanding to early rider programs and eventually opening to the public through the Waymo One app.

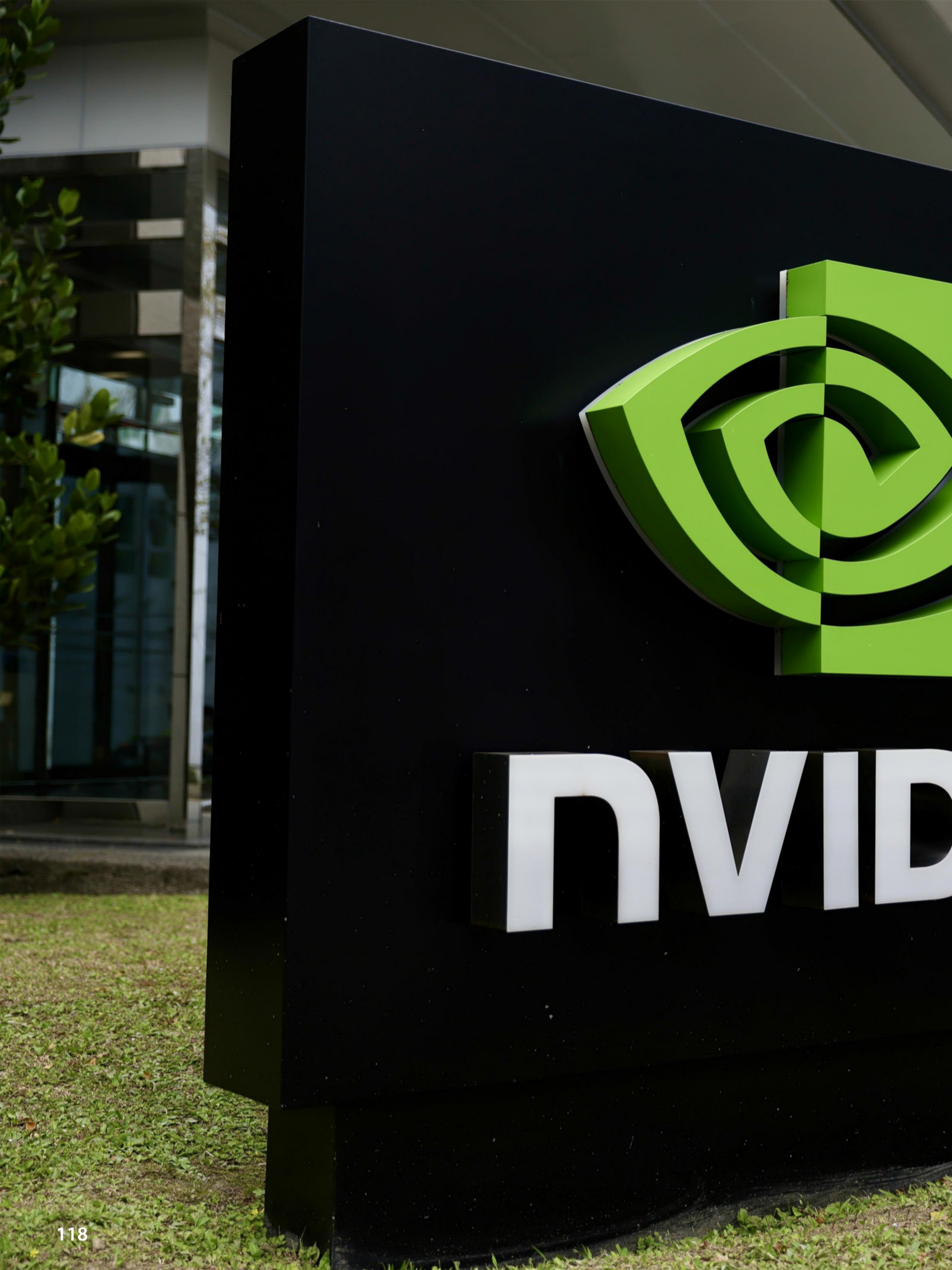
Its vehicles will operate in defined service areas, with remote fleet monitoring and redundancy systems in place. This contrasts with Tesla's driver-centric model, which relies on distributed vehicle intelligence and a software-first approach that lacks external oversight during operation.

COMPETITION INTENSIFIES ACROSS AUTONOMY SECTOR

Waymo's Dallas launch is part of a broader trend in the AV industry as multiple players jockey for position in commercial deployments. GM's Cruise has also targeted Texas cities like Austin and Houston but has faced recent setbacks after safety incidents prompted regulatory pauses.

Other competitors, including Aurora and Zoox, remain in pilot or testing phases, focusing on logistics or narrow urban corridors. Waymo's ability to operate fully driverless passenger services at scale gives it a rare advantage, and the Dallas expansion will be a test of whether that lead can hold under real commercial pressure.

For Tesla, the clock is ticking. While its vehicle fleet advantage and vertically integrated AI efforts are unmatched, the lack of regulatory traction and real-world deployments leaves it behind in the actual robotaxi race.


NVID

NVIDIA ORDERS 300,000 H20 CHIPS FROM TSMC AS DEMAND IN CHINA SURGES

Nvidia has reportedly ordered 300,000 units of its H20 AI chips from Taiwan Semiconductor Manufacturing Company (TSMC), according to sources cited by Reuters. The surge in orders reflects a sharp rise in demand for artificial intelligence hardware in China, even amid continued U.S. export restrictions on advanced semiconductor technologies.

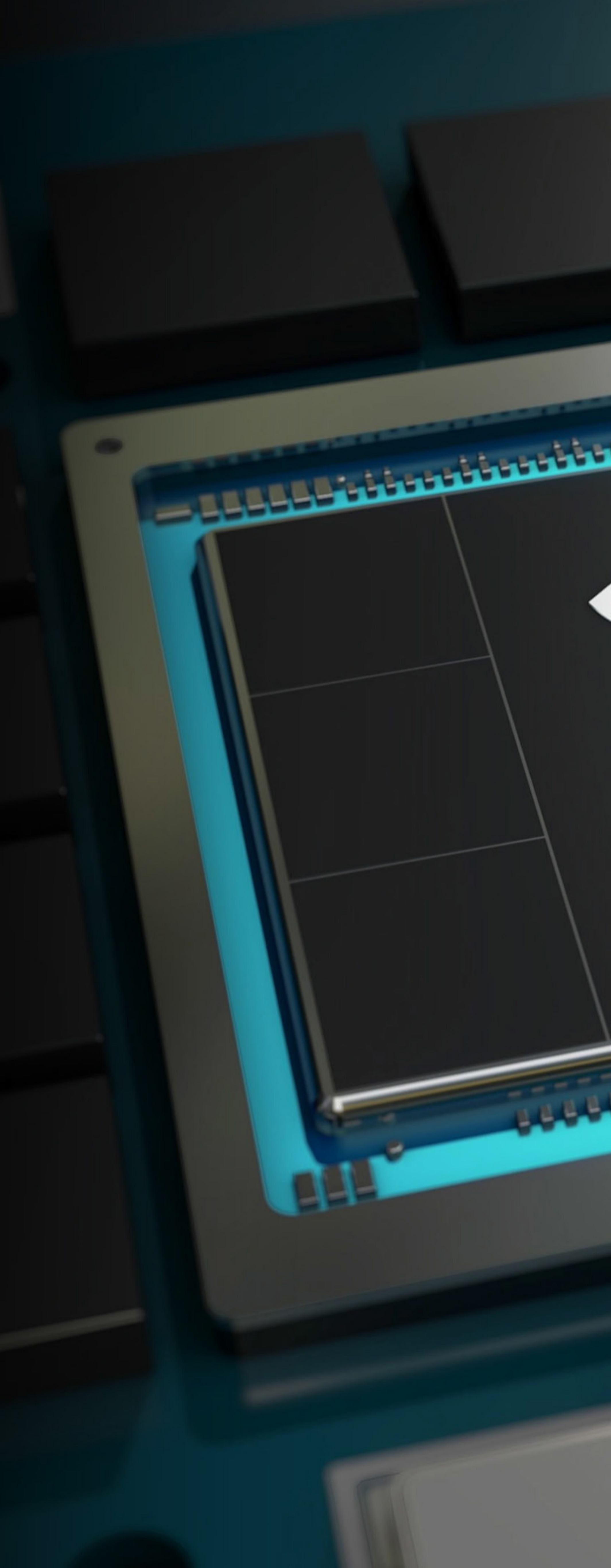
The H20 chip, part of Nvidia's China-specific AI lineup, is designed to comply with U.S. trade regulations while still delivering significant performance for data centers, cloud providers, and AI developers in the country. Nvidia's latest move underscores both the resilience of the Chinese AI market and the company's ongoing strategy to navigate export controls without losing its foothold in the world's second-largest economy.

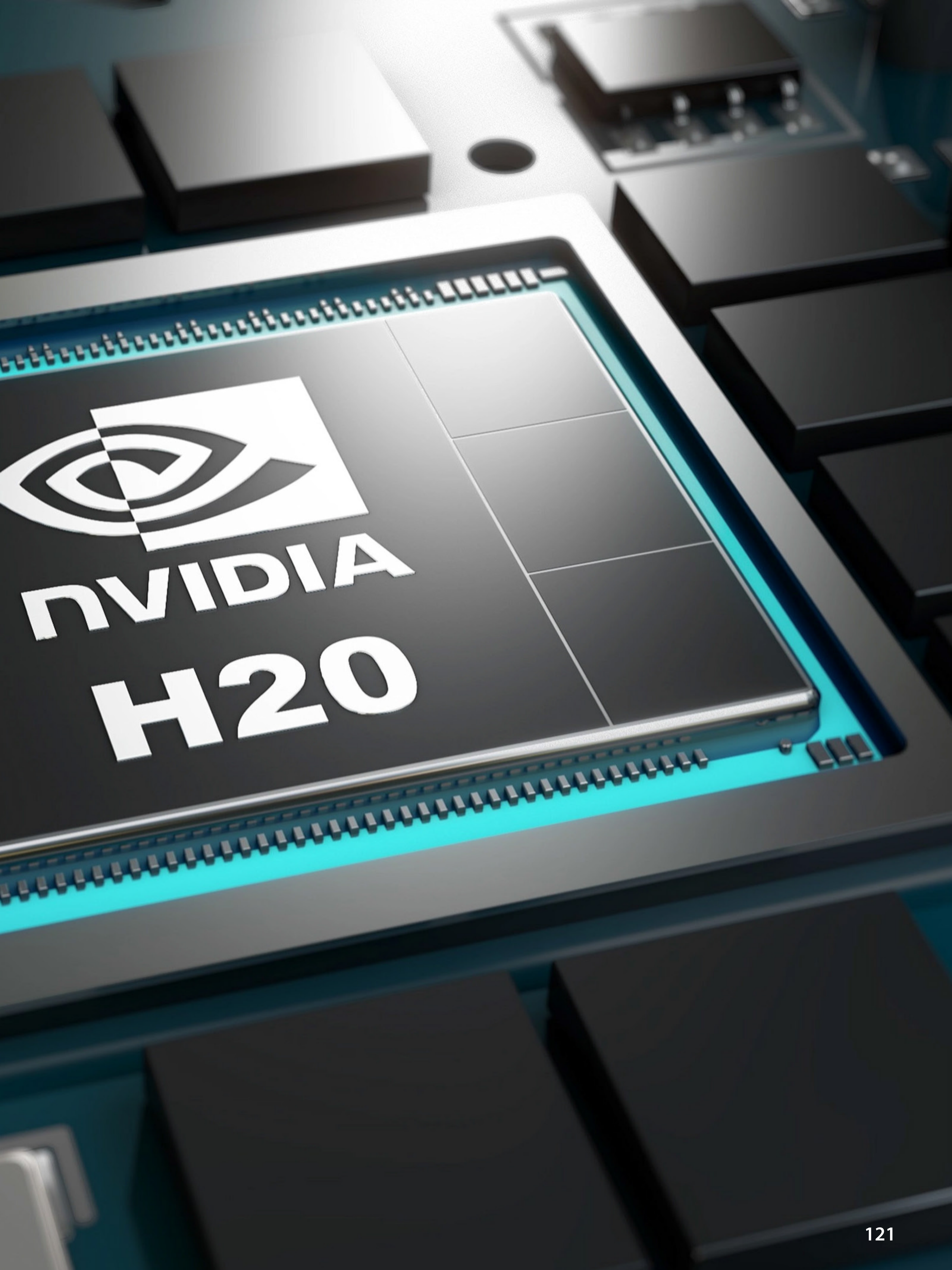
TSMC TO FABRICATE CHINA-COMPLIANT AI CHIPS AT SCALE

The 300,000 H20 units will be manufactured by TSMC, the world's largest contract chipmaker, which continues to serve as Nvidia's primary foundry partner. The chips are expected to be produced using a customized 5nm or 7nm process node, optimized for the performance constraints dictated by U.S. export limits imposed by the Department of Commerce.

Although the H20 is less powerful than Nvidia's flagship H100 and upcoming B200 chips, it offers sufficient processing capabilities for large-scale inference tasks, model deployment, and training within capped power limits. Chinese companies have already begun adopting the H20 for enterprise AI, industrial automation, and natural language processing.

Nvidia originally unveiled the H20 in late 2023, alongside other China-legal alternatives like the L20 and L2. The 300,000-unit order suggests that demand is accelerating well beyond initial expectations, and highlights the gap in local alternatives to Nvidia's hardware despite significant efforts from domestic Chinese players like Huawei, Baidu, and Alibaba to develop competing AI accelerators.




NVIDIA
H20

tsmc
張忠謀大樓
Morris Chang Building

ROBUST DEMAND FROM CHINA'S TECH GIANTS AND STARTUPS

Chinese tech companies—ranging from hyperscalers to startups—are racing to build out their own AI infrastructure following the global boom in generative AI and large language models (LLMs). Companies like Tencent, ByteDance, Alibaba, Baidu, and SenseTime are expected to be among the largest buyers of the H20 chip, deploying them in next-generation AI clusters and data centers.

Despite export restrictions, these firms remain heavily reliant on Nvidia's CUDA software ecosystem, optimized drivers, and deep learning frameworks. The H20 offers a critical bridge that allows them to scale LLMs, recommendation systems, and computer vision applications without violating U.S. trade rules.

The H20's architecture, while throttled compared to Nvidia's U.S. offerings, still outperforms most domestic Chinese AI chips across key performance benchmarks such as inference throughput, energy efficiency, and support for transformer-based model optimization. This performance advantage makes the H20 an attractive stopgap until China's chipmakers can catch up in hardware and ecosystem maturity.

NVIDIA'S STRATEGIC BALANCING ACT AMID U.S. PRESSURE

The order comes at a time when U.S. regulators are increasing scrutiny on the export of advanced AI semiconductors, particularly those capable of training or running large neural networks with potential military applications. Nvidia has responded by developing region-specific chips that meet legal performance thresholds while maintaining commercial viability.

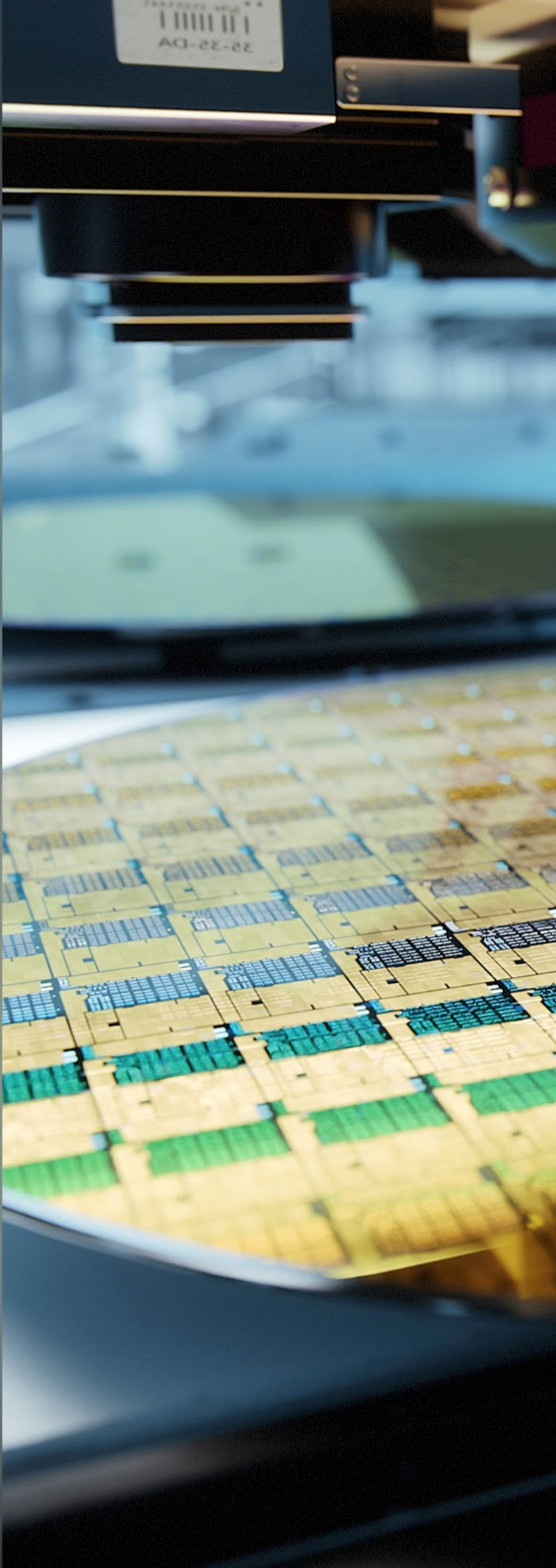
While some U.S. lawmakers have urged tighter restrictions, Nvidia has defended its China strategy by emphasizing compliance, transparency, and its limited role in how customers ultimately use the chips. CEO Jensen Huang has also noted that cutting off U.S. chipmakers from China entirely would harm American innovation and competitiveness, a sentiment echoed by other semiconductor executives.

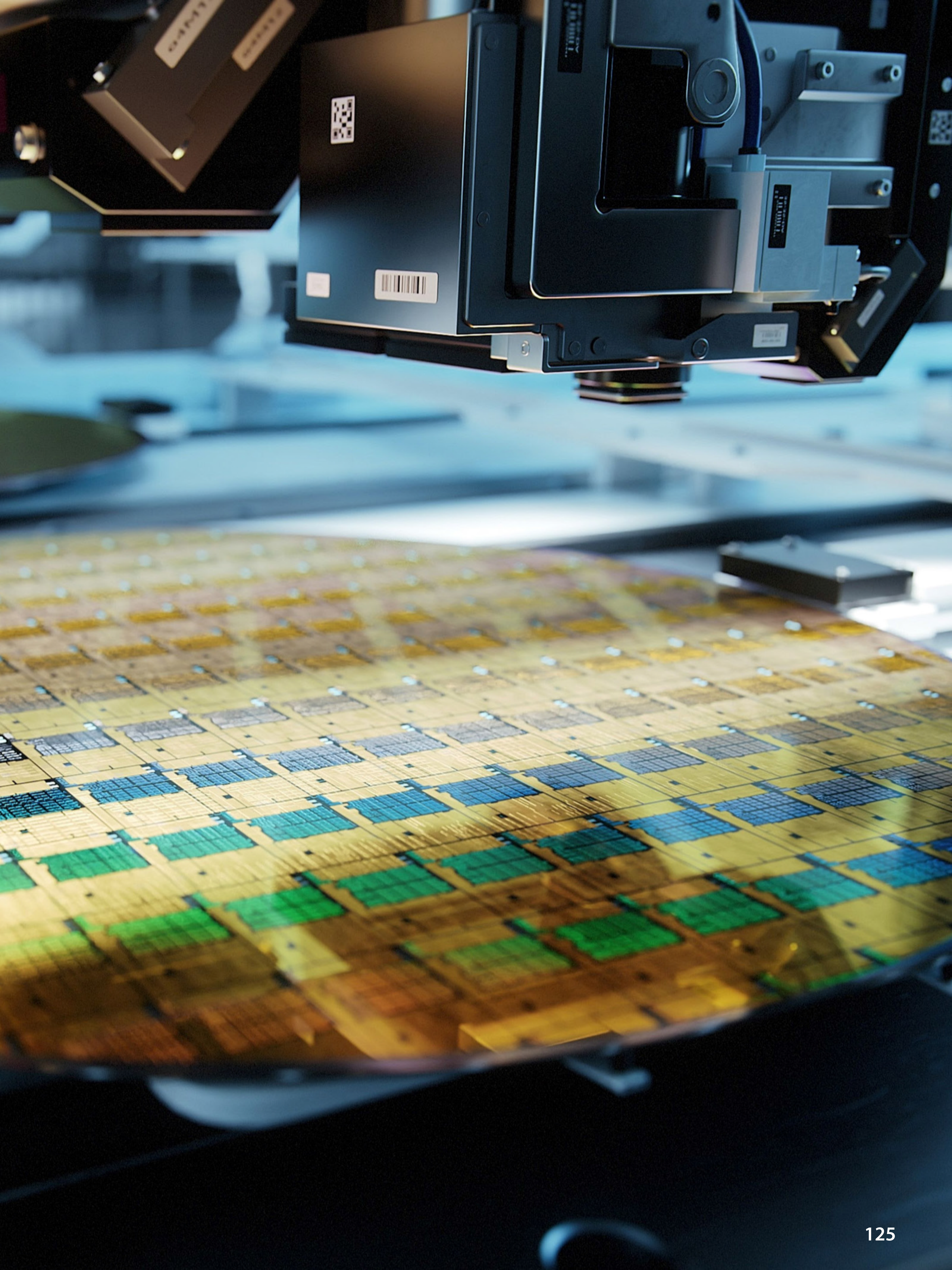
The H20 chip's growing popularity reinforces Nvidia's ability to adapt quickly to geopolitical constraints while preserving key market share. The 300,000-chip order may be the first in a broader production cycle designed to meet sustained demand over the next 12–18 months.

TSMC'S ROLE IN GLOBAL SUPPLY CHAIN DYNAMICS

As Nvidia scales up H20 production, TSMC's strategic importance becomes even more evident. The Taiwanese foundry is responsible for fabricating nearly all of Nvidia's cutting-edge GPUs, including those destined for both U.S. and restricted international markets. The H20 order adds to an already massive pipeline of AI chip production driven by hyperscaler demand from Amazon, Microsoft, Google, and Meta.

TSMC's capacity allocation decisions will directly impact lead times, availability, and pricing across the entire AI industry. Sources familiar with the deal say that H20 production is being prioritized within TSMC's 5nm and 7nm nodes, ensuring that the chips are available for delivery in the second half of 2025.





NVID

Meanwhile, Chinese firms are also placing aggressive orders for legacy-node AI chips as they prepare for any future tightening of export rules. This trend is placing further strain on foundry capacity and highlighting the fragility of the global AI hardware pipeline.

IMPLICATIONS FOR CHINA'S AI STRATEGY AND GLOBAL COMPETITION

Nvidia's expanded H20 output reflects China's unrelenting demand for high-performance AI tools, even under pressure from U.S. restrictions. It also illustrates a crucial dynamic: while the West leads in chip design and manufacturing IP, China still commands significant influence over AI application development and data generation, making it a major force in the global AI race.

The strategic dependency on Nvidia and TSMC—however constrained—is unlikely to fade soon. Until China's domestic semiconductor players can match Nvidia's hardware performance and software ecosystem, companies will continue relying on compliant versions of U.S.-designed chips.

This dynamic has geopolitical implications, as it maintains a delicate economic interdependence between U.S. chip designers, Taiwanese manufacturers, and Chinese customers—all while governments attempt to reshape those connections for strategic autonomy.

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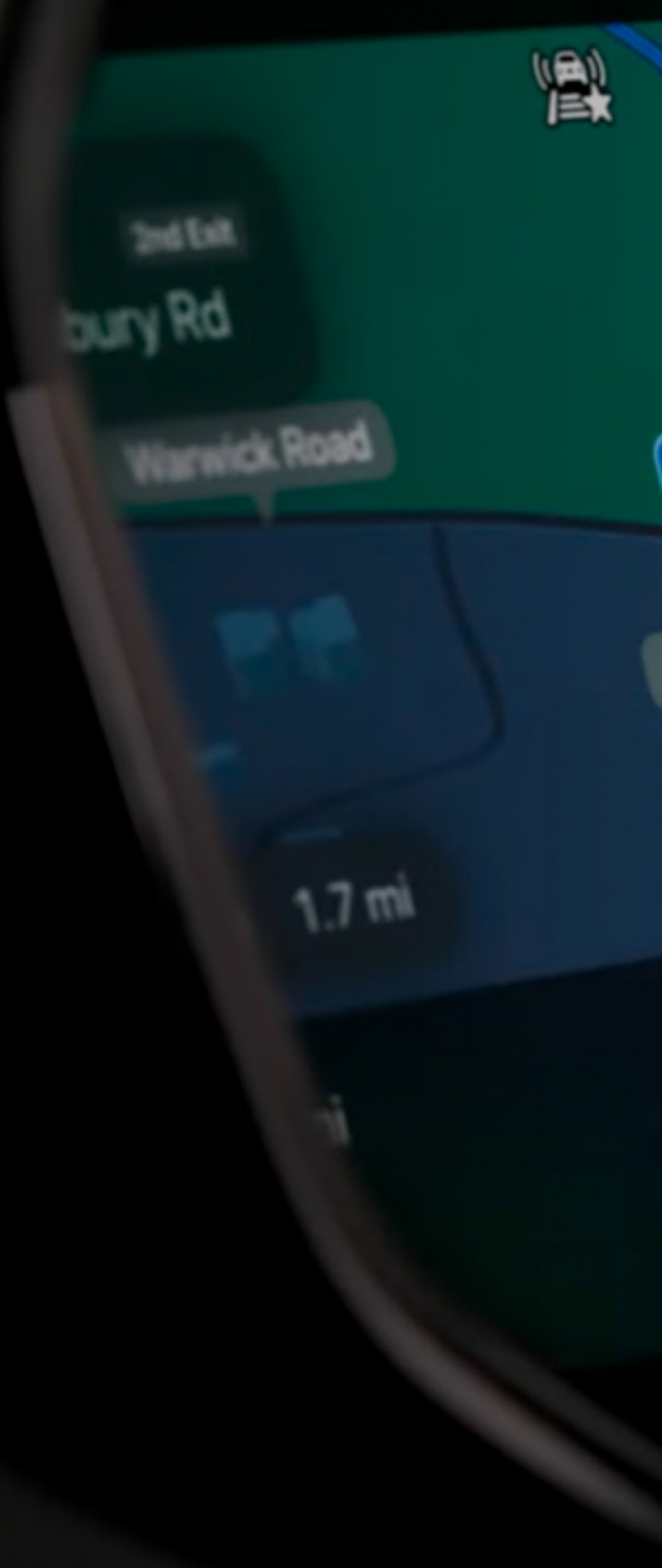
APPLE CARPLAY ULTRA FACES INDUSTRY BACKLASH AS AUTOMAKERS PULL SUPPORT: WHAT MUST CHANGE



Apple's ambitious new in-car interface, CarPlay Ultra, appears to be in trouble before it even launches. With another major automotive manufacturer stepping away from the platform, industry momentum is shifting toward OEM-controlled infotainment systems, raising questions about Apple's strategy and the future viability of its dashboard experience.

CarPlay Ultra, unveiled at WWDC 2022, was designed to be the most immersive version of Apple's in-car experience yet. It promised a system that would take over multiple screens, integrate with core vehicle functions like climate control, and offer deeper real-time vehicle data display. But instead of widespread adoption, Apple is facing growing resistance from automakers wary of ceding control over key digital experiences to a third-party tech giant.

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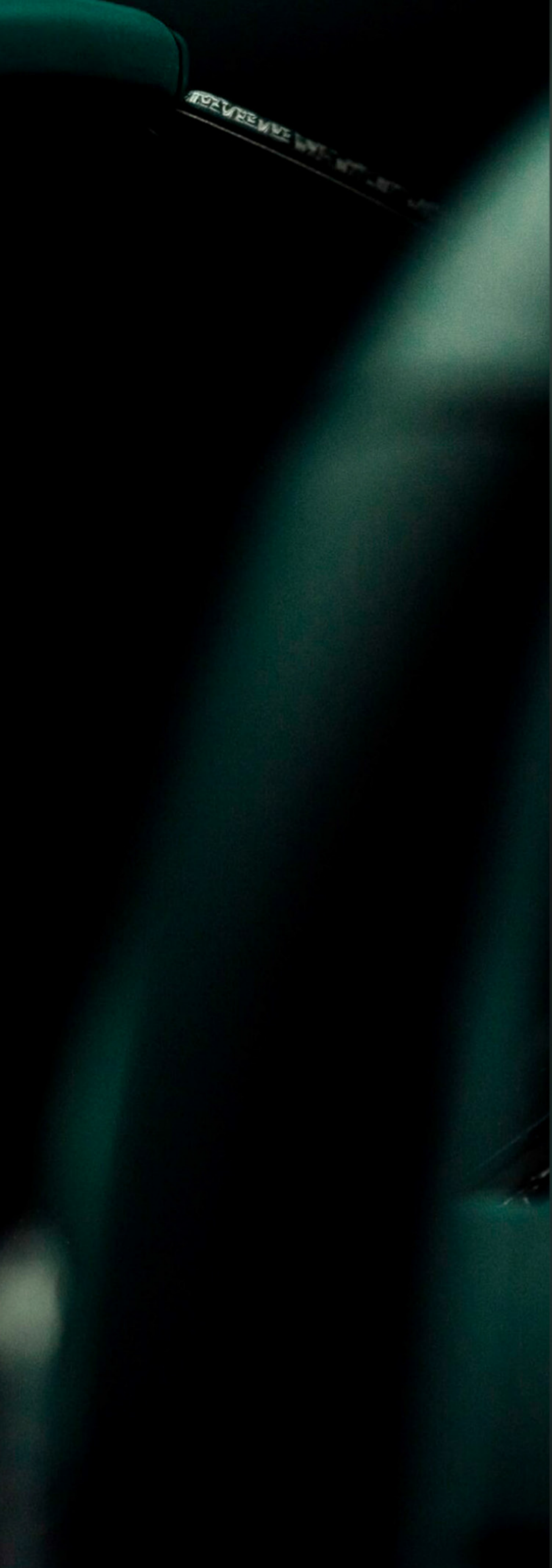

ANOTHER MAJOR EXIT FROM THE CARPLAY ECOSYSTEM

While Apple did not specify launch partners during its CarPlay Ultra announcement, several early commitments came from brands like Mercedes-Benz, Porsche, Audi, and others under the Volkswagen Group. However, reports now confirm that at least one of those automakers has scaled back or completely walked away from plans to support the system in upcoming models.

This marks the second high-profile retreat in recent months. General Motors previously announced that it would phase out CarPlay and Android Auto in favor of its own native software experience, co-developed with Google's Android Automotive OS. That trend is gaining traction across the industry, especially among legacy brands trying to future-proof their connected car strategies—and their data.

WHY AUTOMAKERS ARE PUSHING BACK

At the heart of the resistance is data ownership and customer engagement. CarPlay Ultra doesn't just control media or navigation—it reaches deep into vehicle systems, requiring access to hardware-level data to function fully. That level of integration gives Apple access to information automakers increasingly view as core intellectual property, from driver behavior patterns to in-car monetization opportunities.

For carmakers investing heavily in their own software platforms, handing over the interface—and by extension, the customer relationship—to Apple creates long-term strategic risk. It limits how they can design branded digital experiences and monetize connected features such as subscriptions, over-the-air updates, or AI-based driver assistance.

Additionally, CarPlay Ultra still requires a paired iPhone, which locks out non-Apple users and reduces platform neutrality—an issue that automakers consider problematic as they attempt to build scalable, global solutions across diverse consumer bases.

CARPLAY ULTRA’S VALUE PROBLEM

Despite its slick interface and seamless iOS integration, CarPlay Ultra struggles to justify its value in an era where most high-end vehicles are becoming software-defined products. Automakers no longer want to offer infotainment as a feature—they want it to be a revenue engine. Apple’s current model does little to support that vision.

Critics argue that CarPlay Ultra remains fundamentally iPhone-dependent, which means it doesn’t support true driver profiles or persistent preferences unless the phone is connected. It also risks fragmenting the experience across different models and manufacturers, offering less incentive for automakers to build consistent UX around Apple’s design.

Moreover, with Apple keeping CarPlay Ultra’s core APIs closed, third-party developers and automakers have limited ability to extend or customize the platform, making it difficult to differentiate or innovate.

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WHAT APPLE NEEDS TO CHANGE

To reverse the trend of automakers walking away, Apple will likely need to shift its position from controller to collaborator. That could involve opening up more APIs, allowing co-branded customization, or enabling deeper integration of OEM services like navigation, telematics, or EV management apps.

Apple may also need to decouple certain CarPlay features from the iPhone, offering a more persistent and cloud-synced experience that can tie into vehicle profiles—similar to how Android Automotive operates without a phone.

Critically, Apple will need to provide automakers with ways to generate revenue within the CarPlay environment—through subscription services, app marketplaces, or analytics. Without that, CarPlay Ultra will remain a polished UI without a compelling business case for manufacturers.

More Settings
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A CROSSROADS FOR IN-CAR UX

The struggles of CarPlay Ultra reflect a broader inflection point in the automotive world. As vehicles become more like rolling smartphones, the question isn't just about who powers the screen—but who controls the platform, the data, and the relationship with the driver.

If Apple can't evolve its approach, more automakers will continue to build their own ecosystems—and CarPlay Ultra may remain a vision that never makes it into the real world.

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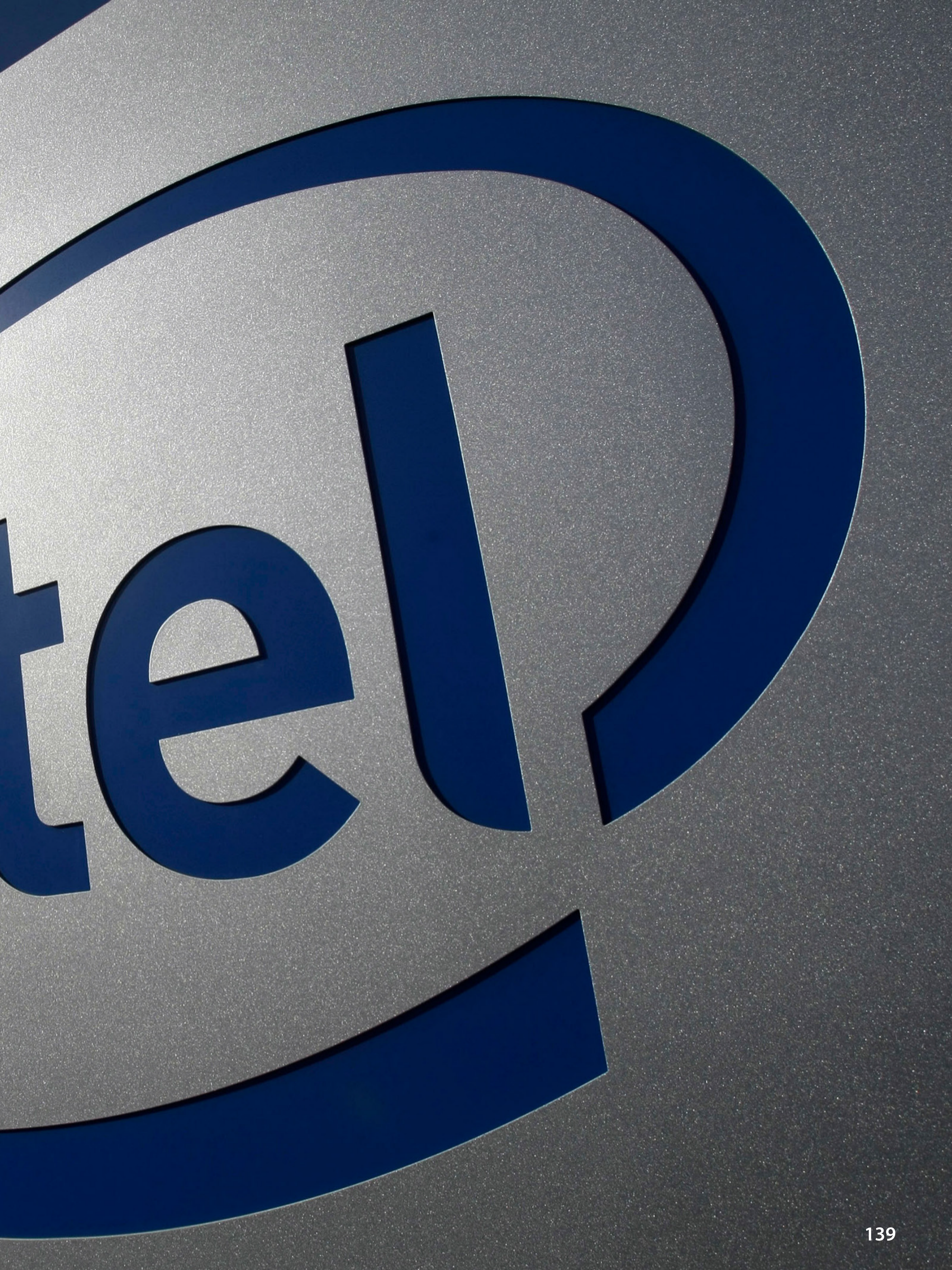
APPLE INVESTS $500 MILLION TO SOURCE CRITICAL IPHONE MATERIAL FROM THE U.S.

Intel is implementing major cost-cutting measures, including reduced capital expenditure and workforce reductions, as the U.S. chip giant works to recover from years of lost ground to competitors like TSMC, AMD, and Nvidia. The moves are part of CEO Pat Gelsinger's multi-year turnaround strategy, which aims to reposition Intel as a top-tier semiconductor leader across both design and manufacturing.

The company's latest disclosures indicate tighter internal cost controls, delayed factory investments, and targeted layoffs across underperforming divisions. These adjustments come amid broader macroeconomic headwinds and sustained



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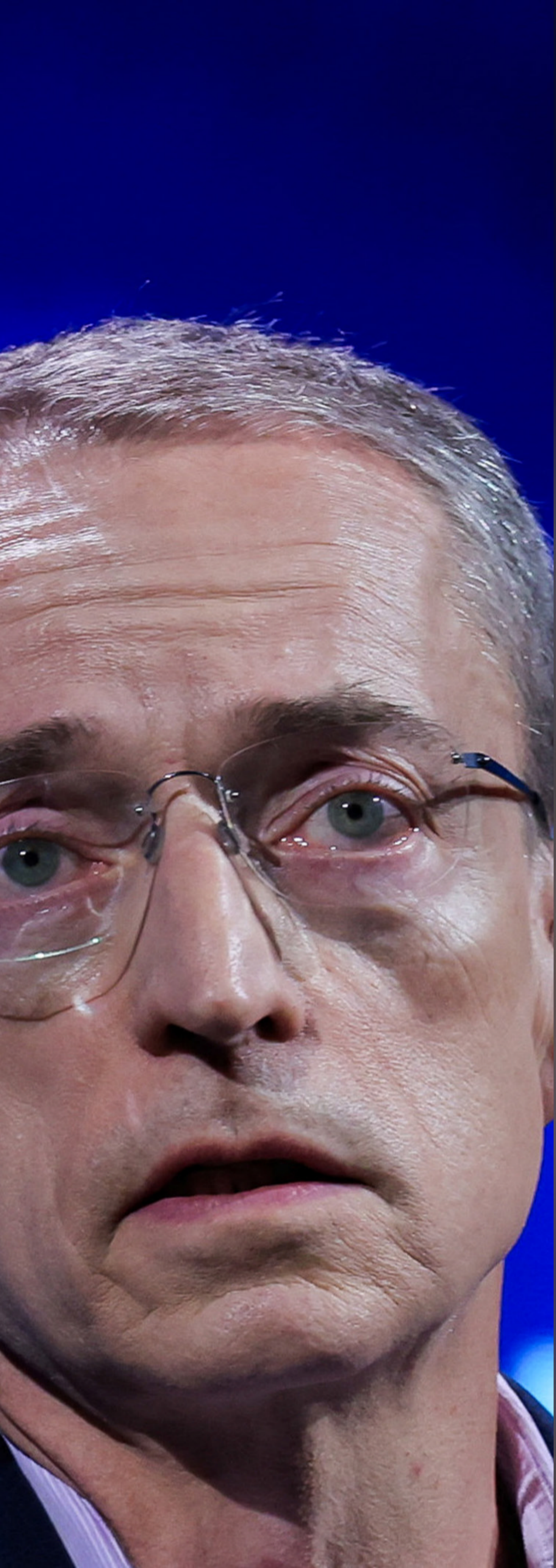


underperformance in Intel's data center and client computing businesses—two areas once considered its strongest revenue pillars.

SPENDING PULLED BACK AS FABS FACE TIMING CHALLENGES

Intel has trimmed its 2025 capital expenditure guidance, citing the need for a more disciplined investment pace as it builds out its foundry capacity through the Intel Foundry Services (IFS) initiative. Flagship projects like the Ohio and Arizona fabs, which were expected to rival TSMC's advanced packaging capabilities, will now see staggered buildouts and revised commissioning timelines.

While Intel maintains its long-term commitment to leading-edge manufacturing, executives noted that near-term capacity needs do not justify aggressive infrastructure spending at current demand levels. Instead, the company will focus on completing key process transitions, including the rollout of Intel 3 and Intel 18A nodes, which are critical to winning foundry clients and regaining process parity.

Intel is also navigating delays in U.S. CHIPS Act funding disbursement, which has slowed construction on several planned fabs. Though the company remains eligible for billions in federal subsidies, cash flow pressure and uncertain short-term demand have led to temporary internal pullbacks.

WORKFORCE REDUCTIONS TARGET NON-CORE OPERATIONS

As part of its cost-saving efforts, Intel is enacting layoffs across select business units, with the heaviest cuts hitting non-core software teams, legacy hardware groups, and overlapping product segments. The company has not disclosed specific numbers, but internal sources suggest the reductions could affect thousands of roles globally, particularly in areas that duplicate functionality or show low growth potential.

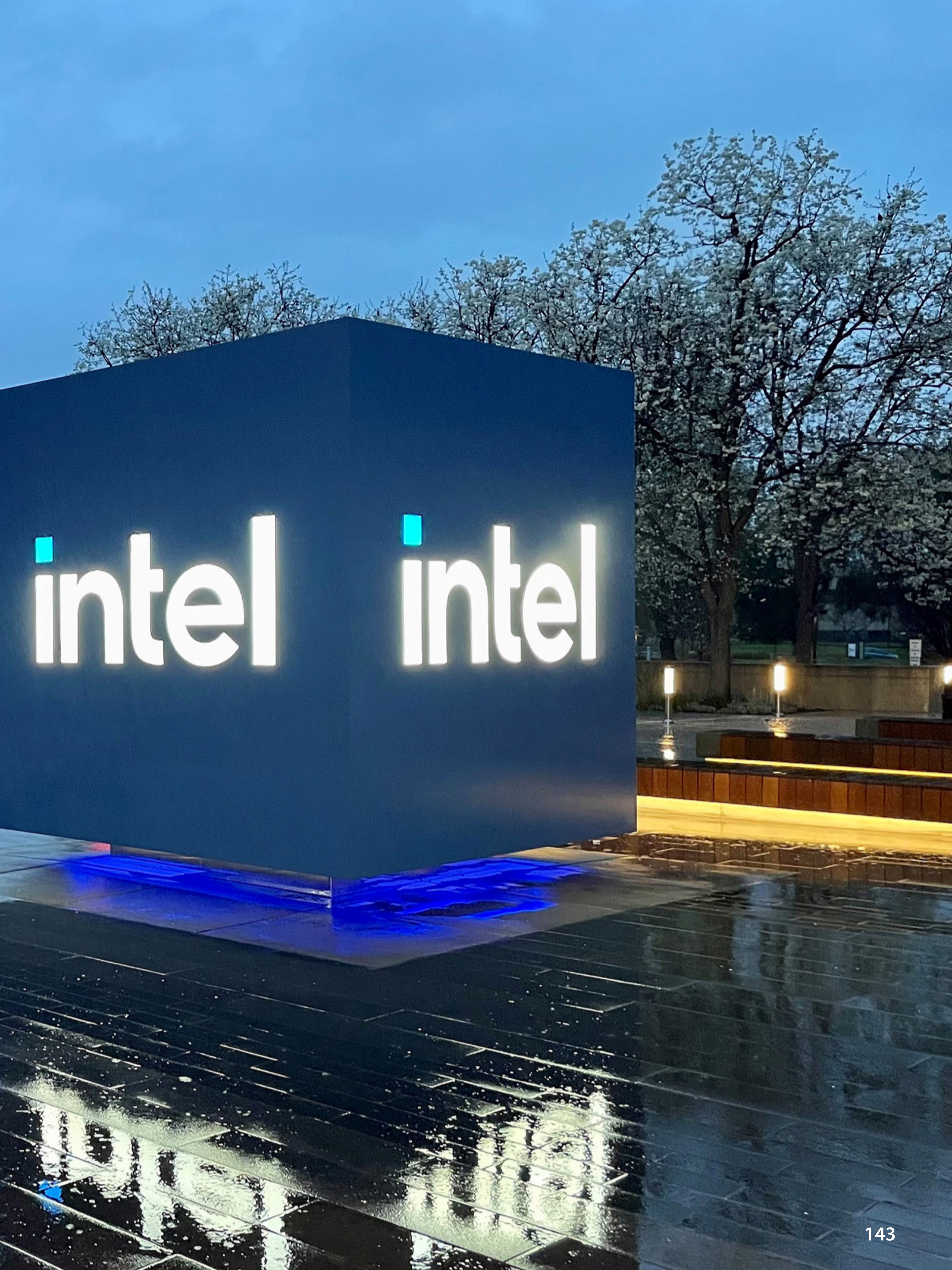
Intel had already reduced its headcount by more than 10% since 2022, and the latest round underscores the pressure to streamline operations and reallocate capital toward core product engineering, AI chips, and foundry operations. Resources are being shifted toward areas with stronger future potential, including AI accelerators, edge computing, and specialty server chips.

The cost-cutting program is part of Intel's broader goal to save $10 billion annually by 2026, a benchmark set by Gelsinger to fund reinvestment without increasing debt burden.

COMPETITIVE GAP WIDENS AS NVIDIA, AMD, AND TSMC SURGE

Intel's belt-tightening comes as rivals continue to post strong growth in high-performance computing and AI silicon. Nvidia's dominance in GPUs and AI accelerators has widened the competitive gap, while AMD's efficient x86 processors have eaten into Intel's server and client CPU share. At the same time, TSMC maintains a commanding lead in advanced process node manufacturing, supporting nearly every major fabless chip company worldwide.

Despite these challenges, Intel remains committed to building an end-to-end design-to-manufacturing platform, a strategy it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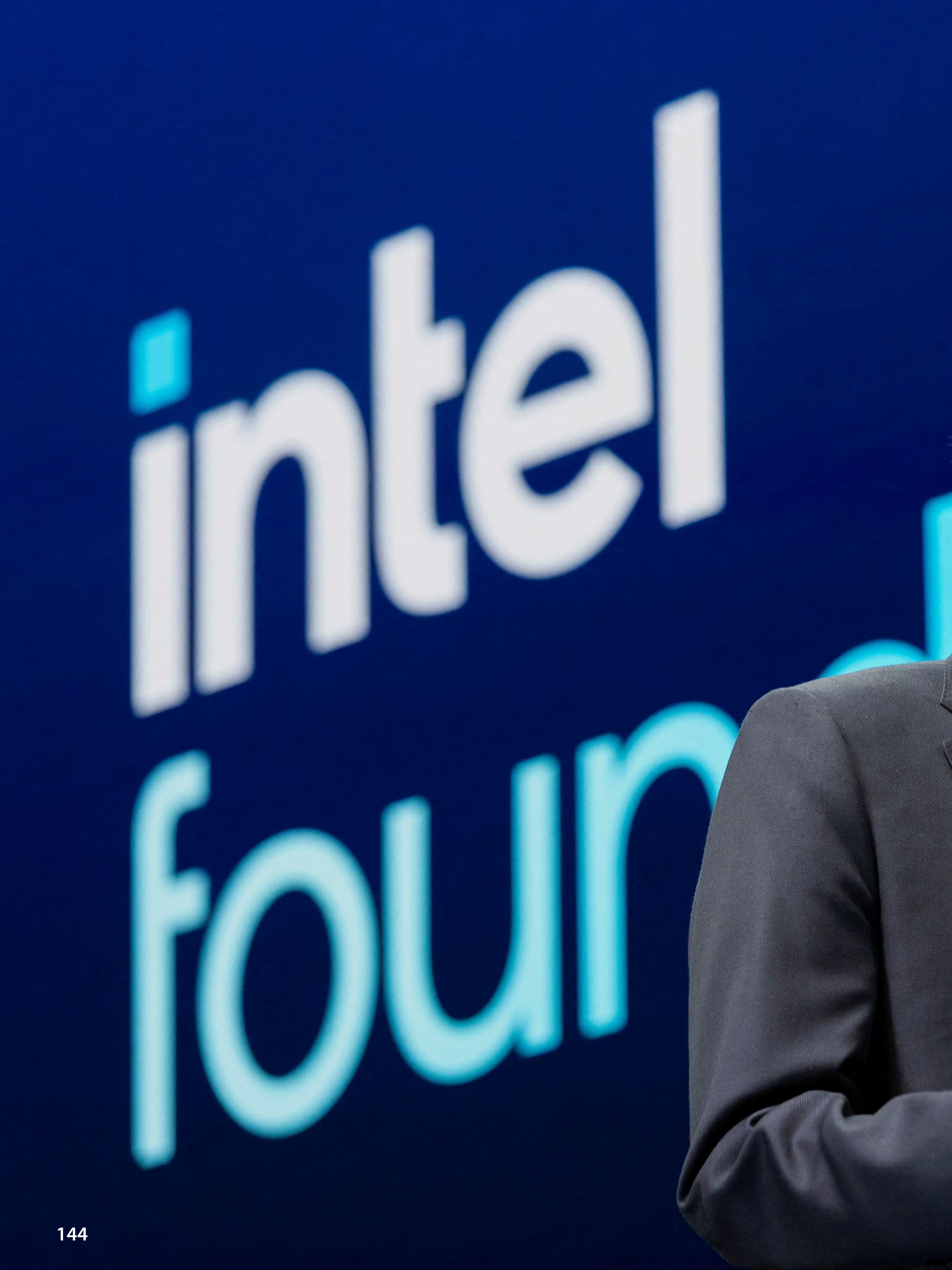
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believes will differentiate it from competitors that rely on third-party foundries. Intel Foundry Services is still in early stages but has signed design partnerships with companies like MediaTek and Arm, laying the groundwork for a viable alternative to TSMC in the long term.

Gelsinger has also emphasized Intel's role in national semiconductor resilience, reinforcing its position as a strategic U.S.-based chipmaker amid rising geopolitical tension and the global push for supply chain localization.

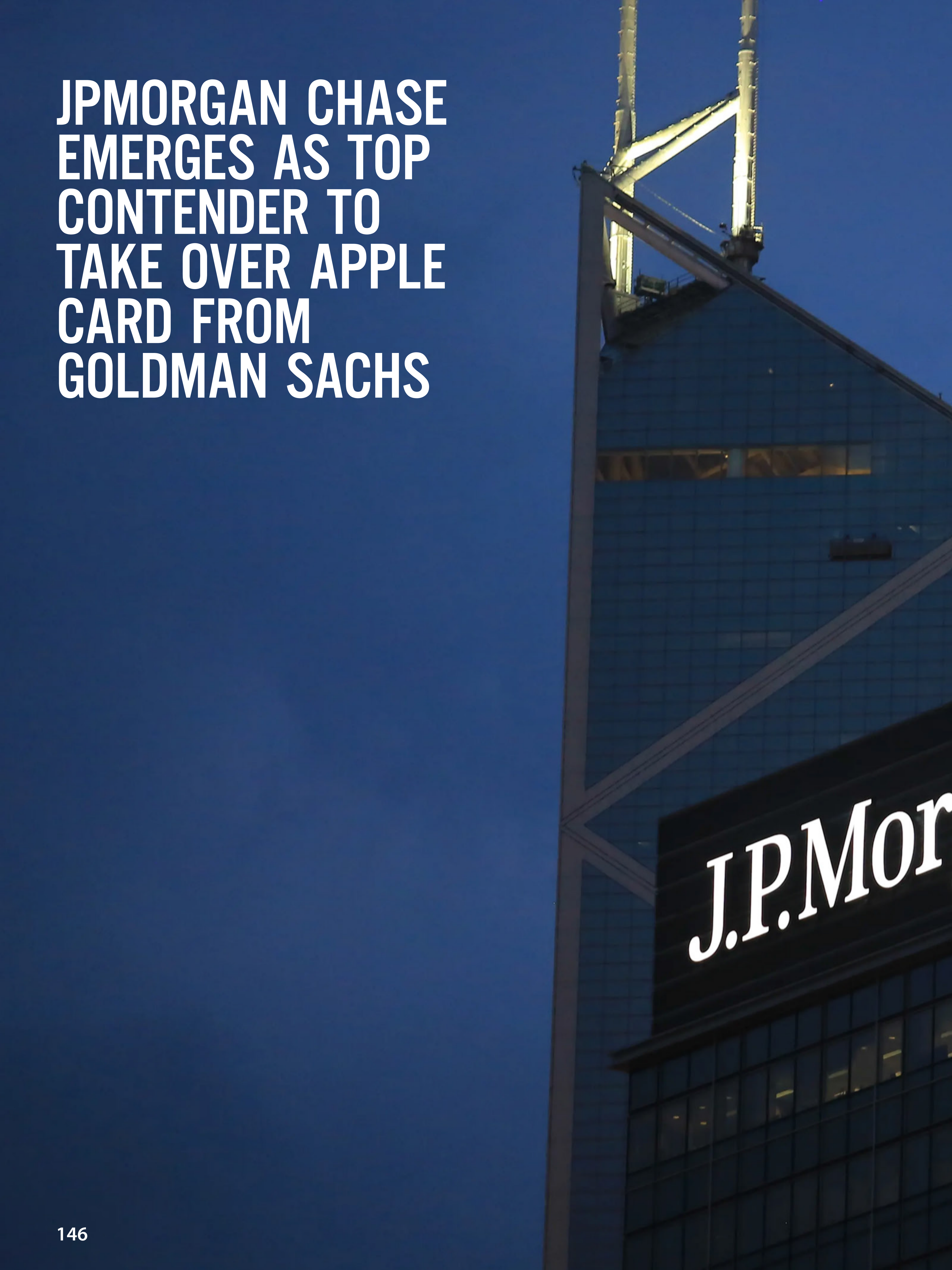
INTEL'S TURNAROUND DEPENDS ON EXECUTION, NOT PROMISES

Industry analysts warn that while Intel's roadmap is technically sound, its success hinges on flawless execution—something the company has struggled with in recent years. Delays in process nodes, missteps in product launches, and internal leadership turnover have all eroded investor confidence.

To recover, Intel must deliver on its 18A node timeline, convert foundry design wins into long-term contracts, and regain credibility with enterprise clients who have increasingly turned to AMD or custom silicon. Intel's upcoming Sierra Forest and Granite Rapids server CPUs, set to launch in 2025, will be key tests of its ability to reestablish relevance in the data center market.

In the meantime, cost containment and strategic focus remain the immediate priorities. As Gelsinger stated during Intel's last earnings call, "We are doing what it takes to restore Intel's leadership position, even if it means making tough but necessary trade-offs today."

JPMORGAN CHASE EMERGES AS TOP CONTENDER TO TAKE OVER APPLE CARD FROM GOLDMAN SACHS



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Card

Save 5% at Apple with a new Apple Card.*

*Through January 31. Purchases made with Apple Card Monthly Installments are excluded. Additional exclusions and terms apply. Visit apple.co/save5 for additional details.

Marisa Robertson

JPMorgan Chase is now the leading candidate to take over the Apple Card partnership, as Goldman Sachs prepares to exit its consumer credit relationship with Apple, according to multiple reports. The potential shift marks a major development in Apple's evolving financial services strategy and could signal a significant upgrade in scale, rewards integration, and credit infrastructure for the Apple Card product.

Goldman Sachs, which has been Apple's partner since the Apple Card's launch in 2019, is reportedly winding down its consumer credit ambitions after years of losses and operational challenges in retail banking. The bank is actively seeking a buyer to assume its role as the issuing partner of Apple Card and Apple's broader banking services, including the high-yield Apple Savings account.

Sources familiar with the matter say that JPMorgan Chase is now the frontrunner, outpacing competitors like American Express and Synchrony, due to its long-standing relationship with Apple, massive credit card infrastructure, and strong position in digital financial services.

JPMORGAN'S FINTECH DEPTH ALIGNS WITH APPLE'S VISION

JPMorgan Chase already processes billions in Apple Pay transactions annually, and its Chase Sapphire card lineuphas proven to be one of the most successful lifestyle-focused products in the U.S. credit market. The bank's capabilities in app-based financial management, consumer analytics, and cardholder rewards align closely with Apple's tech-first approach to personal finance.

If a deal is finalized, JPMorgan is expected to assume full responsibility for issuing the

Apple Card, managing credit lines, handling compliance, and maintaining Apple Savings accounts—all while supporting the card's deep integration into the Wallet app, iPhone interface, and Apple Pay ecosystem.

The move could also bring more advanced rewards programs, loyalty partnerships, and international expansion opportunities for Apple Card, which has so far been U.S.-only.

Marisa Robertson

WHY GOLDMAN IS WALKING AWAY

Goldman Sachs originally partnered with Apple to expand into consumer finance, but the bank's foray into credit cards has been marked by higher-than-expected losses, operational inefficiencies, and regulatory friction. The Apple Card portfolio, while popular among iPhone users, required significant customer service infrastructure and back-end financial support that Goldman struggled to scale profitably.

Earlier this year, Goldman confirmed it would wind down its partnership with Apple and sell the card business, ideally transferring all customer accounts to a new partner with minimal disruption.

The move is part of a larger retrenchment from consumer banking that also includes the sale of Goldman's Marcus lending platform and its retreat from other retail credit products.

A BIGGER FUTURE FOR APPLE CARD UNDER JPMORGAN

JPMorgan Chase's entry could revitalize the Apple Card's feature set. Analysts expect potential upgrades to include enhanced rewards categories, deeper cashback offers, international usability, and co-branded

partner benefits tied to travel, entertainment, and Apple services.

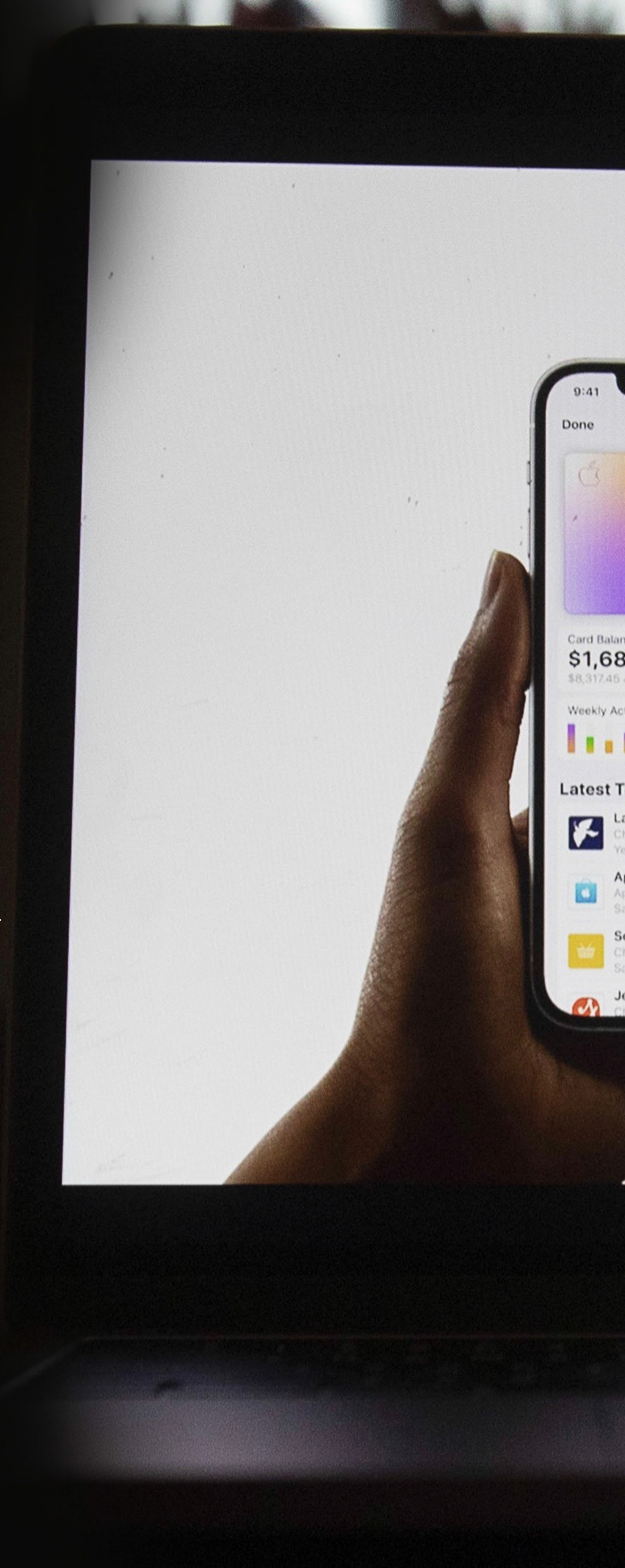
Apple, which views financial services as a long-term growth pillar, is reportedly looking for a bank partner that can scale globally, maintain high compliance standards, and support future digital wallet innovation—including BNPL (buy now, pay later), installment plans, and deeper integration into iOS.

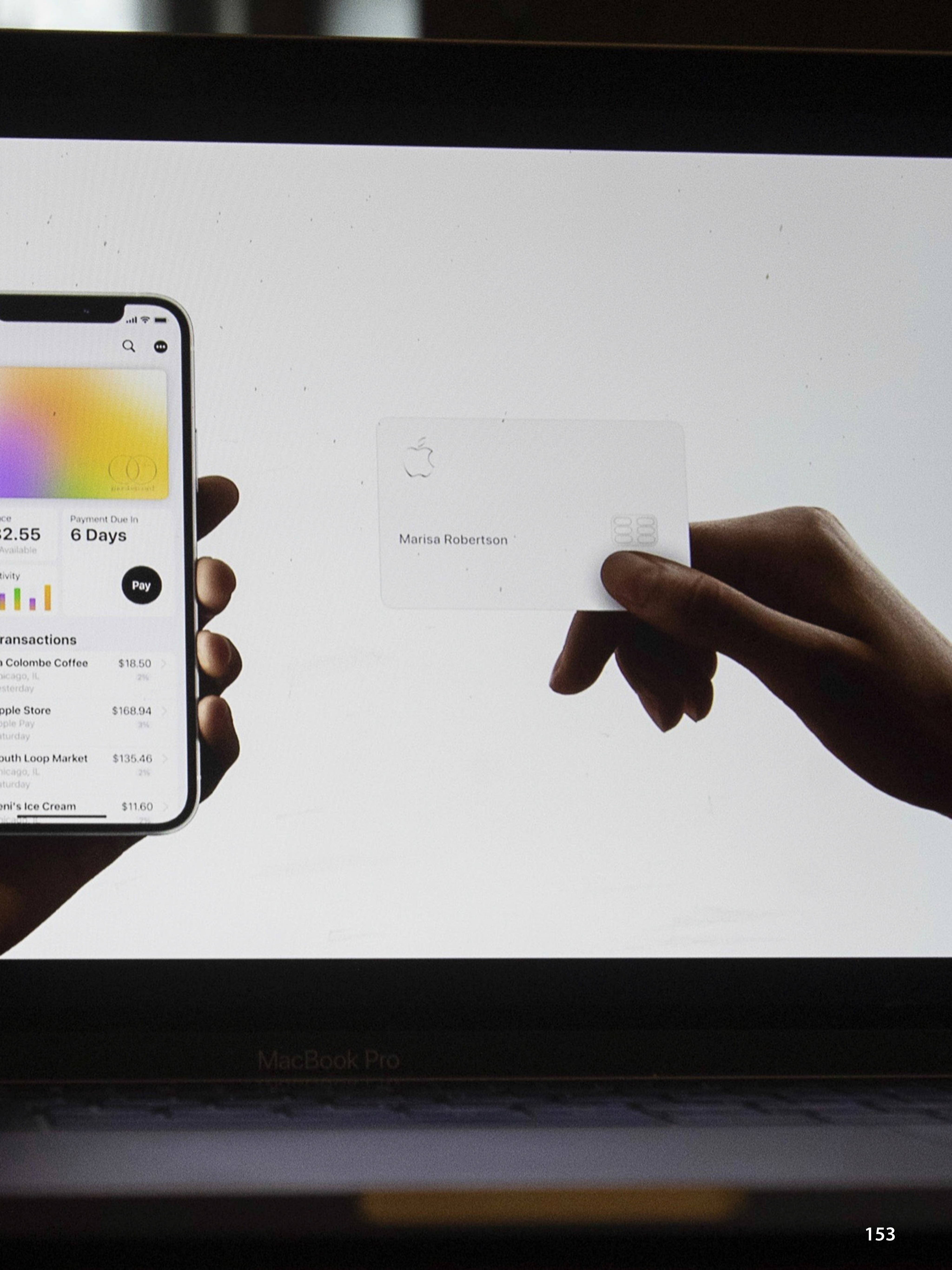
Chase is uniquely positioned to deliver on those requirements, with a mature fraud detection platform, a massive customer support network, and experience handling high-volume digital payment ecosystems.

TIMING AND TRANSITION PLANS

While neither Apple nor JPMorgan has officially confirmed the deal, discussions are said to be in advanced stages, with a potential announcement expected later in 2025. If JPMorgan takes over the Apple Card portfolio, a smooth transition process would be required to migrate millions of customer accounts without service disruption or data loss.

Apple will likely maintain its existing user experience and branding, with the backend bank handling regulatory and financial operations. Customers could see expanded features and new terms under the new issuer, but Apple is expected to retain product control over UI, approval flows, and account management inside iOS.





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Marisa Robertson
MacBook Pro

INDIA ACCOUNTS FOR 44% OF U.S. SMARTPHONE IMPORTS IN Q2 2025 AS TARIFFS DISRUPT GLOBAL SUPPLY CHAINS

India has rapidly emerged as a dominant source of smartphone imports into the United States, accounting for 44% of all units shipped in Q2 2025, according to new trade data reviewed by industry analysts. The shift reflects a major restructuring of global supply chains as U.S. tariffs on Chinese-made electronics accelerate the realignment of production bases across Asia.

The milestone marks the first time India has approached parity with China in U.S. smartphone import share, with analysts citing a 240% year-over-year increase in Indian smartphone exports driven by production from Apple, Samsung, and other key manufacturers. The numbers

underscore the success of India's government-backed manufacturing incentives and the growing reliance of global tech companies on the country as an alternative to China.

TARIFFS TRIGGER GLOBAL MANUFACTURING REALIGNMENT

The surge in Indian smartphone exports follows the continuation of U.S. tariffs on a wide range of China-made electronics, originally introduced during the previous administration and reaffirmed with adjustments in 2024. Smartphones assembled in China now face steeper import duties, making it less financially viable for companies to export to the U.S. from traditional facilities in Shenzhen and Guangzhou.

Major tech brands have responded by diversifying their supply chains, increasingly shifting final assembly operations to India and Southeast Asia. India has quickly positioned itself as the most capable alternative, thanks in part to the Indian government's Production-Linked Incentive (PLI) scheme, which provides tax benefits and subsidies to manufacturers meeting local value-addition targets.

As a result, smartphone exports from India to the U.S. have surged, particularly from factories run by Foxconn, Pegatron, and Tata Group, which handle iPhone production, as well as Samsung's large-scale plant in Uttar Pradesh.

APPLE AND SAMSUNG LEAD INDIA-TO-U.S. EXPORT GROWTH

Apple has been one of the primary drivers of the shift. In 2025, the company ramped up production of the iPhone 15 and iPhone 16 series in India, with nearly 25% of all global iPhone output now assembled in the country. Much of this inventory is being shipped directly to the U.S. to avoid tariff penalties and reduce geopolitical risk.

Samsung has also increased its India-based smartphone exports to the U.S., leveraging its Noida facility to assemble mid- and high-end Galaxy models. Together, Apple and Samsung are responsible for the majority of smartphones imported into the U.S. from India in Q2 2025.

These shifts have boosted India's status not only as a hub for domestic smartphone consumption but also as a strategic global export base. The country's infrastructure, labor scale, and favorable trade ties with the U.S. have made it the preferred manufacturing destination for high-volume smartphone brands seeking to avoid Chinese dependency.

CHINA'S SHARE SHRINKS AMID POLICY HEADWINDS

While China still remains a key part of the global electronics manufacturing ecosystem, its share of U.S. smartphone imports continues to decline. Customs data shows that China accounted for just over 50% of smartphone shipments to the U.S. in Q2 2025, down sharply from more than 70% three years ago.

In addition to tariffs, Chinese manufacturers face rising concerns about supply chain transparency, labor conditions, and geopolitical tensions, all of which are prompting U.S. and European companies to reduce overexposure to the region.

Chinese firms like Xiaomi, Oppo, and Vivo are increasingly pivoting toward domestic and Southeast Asian markets, while Apple and other

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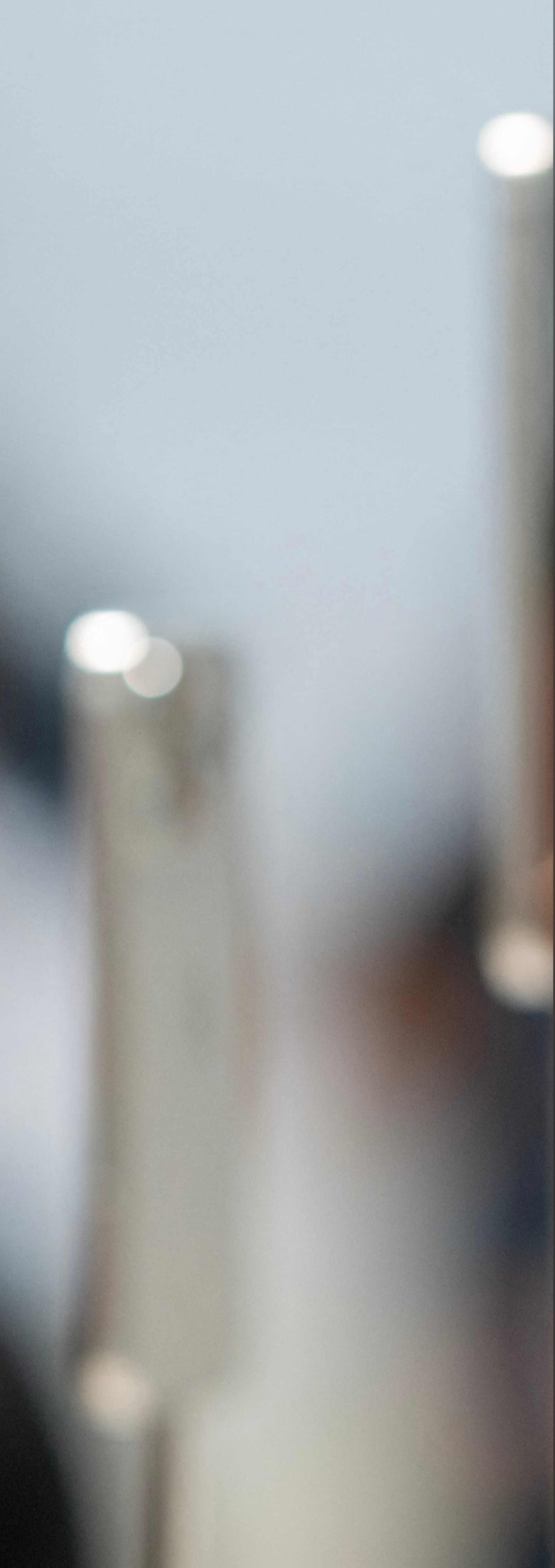

Western firms double down on a China+1 strategy that puts India in the center of long-term global supply planning.

FUTURE OUTLOOK: INDIA'S ROLE IN TECH MANUFACTURING

Industry experts expect India's share of U.S. smartphone imports to cross the 50% threshold by 2026, as companies finalize plans to expand production capacity and localize more of their component sourcing. Efforts are already underway to establish semiconductor packaging, battery assembly, and camera module fabrication inside India, further reducing dependence on Chinese inputs.

However, challenges remain. India's logistics, component ecosystem, and labor upskilling still lag behind China's in scale and maturity. But with sustained government support and aggressive foreign direct investment, India is on track to become a central pillar of post-globalization electronics manufacturing.

As tariffs continue to reshape global trade flows, the rise of India as a smartphone export powerhouse highlights how industrial policy and geopolitics are now key drivers of where and how tech products are made.

APPLE EXPANDS LIVE VIDEO SHOPPING SERVICE TO INDIA FOLLOWING U.S. LAUNCH

Apple is bringing its live video shopping service to India, expanding the retail feature internationally after a limited rollout in the United States earlier this year. The move signals Apple's growing interest in interactive e-commerce, as it blends live product demonstrations with real-time consultations to boost online sales—especially in high-growth markets like India.

The video shopping service allows users to connect directly with Apple Specialists via one-way video and two-way audio for guided product exploration, comparisons, and purchasing support. Originally launched for the iPhone

lineup in the U.S., the feature is now being adapted for Indian consumers ahead of the country's festive season, when demand for electronics typically surges.

Apple confirmed the expansion this week through its India storefront, noting that the video shopping service will be available during standard retail hours in both English and select regional languages, reflecting the company's localization strategy for one of its fastest-growing markets.

A STRATEGIC MOVE IN INDIA'S E-COMMERCE BOOM

India is among the world's most competitive e-commerce battlegrounds, with platforms like Amazon, Flipkart, and Reliance Digital fighting for dominance in electronics sales. By integrating live, personalized shopping into its official channel, Apple is carving out a direct-to-consumer strategy that bypasses third-party sellers while reinforcing its brand control.

The video shopping feature offers customers a more informed buying experience—one where they can get real-time answers on device specs, trade-in programs, accessories, and financing options. This type of guided sale has proven effective in converting high-value purchases, particularly for products like iPhones, MacBooks, and iPads.

Apple is also leveraging the service to highlight exclusive online offers and Apple Store benefits, such as custom configurations, education discounts, and AppleCare+. The company sees the feature as a hybrid between retail and e-commerce—especially valuable in regions where Apple has few physical stores but growing brand demand.

Apple BKC
Arriving soon.

EXPANDING BEYOND IPHONES AND THE U.S.

Although the feature originally launched in the U.S. to promote the iPhone 14 and 15 series, Apple is expected to expand the service to include Macs, iPads, and accessories over the next several months. The Indian launch marks the first significant international expansion of the tool, and further rollouts in the Middle East and Southeast Asia are reportedly being considered.

Apple has not disclosed how many sales the U.S. service generated during its trial period, but early indicators suggest high engagement rates and improved product conversion metrics for online shoppers who interacted with a live Apple Specialist.

In India, Apple's official online store has steadily grown since launching in 2020, but the addition of real-time video support may help it compete more directly with hyper-personalized shopping experiences offered by rivals and marketplaces. It may also serve as a testbed for Apple's broader ambitions in blending digital commerce with customer support.

DIGITAL RETAIL AS AN APPLE GROWTH CHANNEL

Apple's push into video-assisted e-commerce comes as part of a wider strategy to enhance the digital retail experienceand drive revenue beyond hardware margins. The company is steadily building out a retail ecosystem that includes online storefronts, physical Apple Stores, localized financing plans, and now live consultations.

In emerging markets like India, where Apple is still gaining share in premium segments, creating a

trusted, high-touch online shopping experience could be key to driving adoption. Indian consumers often seek detailed guidance before purchasing high-cost devices, and Apple's service offers that expertise without requiring a store visit.

Apple also benefits from controlling the sales funnel end-to-end, allowing for tighter integration with its trade-in systems, EMI offers, and post-purchase services like setup assistance and device migration.

LOOKING AHEAD: RETAIL INNOVATION BEYOND THE STORE

The launch of video shopping in India is just one part of Apple's evolving retail blueprint. The company is actively exploring mixed-reality commerce, personalized buying journeys, and on-device retail AI features for future rollouts.

For now, the India expansion is a clear sign that Apple sees live, human-centered e-commerce as a scalable global model—one that complements physical stores while reaching millions of customers in regions where store footprints remain limited.

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INDIA SURPASSES CHINA IN SMARTPHONE EXPORTS TO U.S. AS MANUFACTURING SOARS 240%

India has surpassed China as the leading exporter of smartphones to the United States, according to a new report, signaling a pivotal shift in global tech manufacturing. The development comes amid a dramatic 240% year-over-year increase in India's smartphone exports to the U.S., driven by a combination of geopolitical dynamics, policy incentives, and multinational companies restructuring their supply chains.

Data compiled in the latest trade analysis by the India Cellular and Electronics Association (ICEA) and reported by the Ministry of Commerce reveals that Indian-made smartphones now account for the largest share of U.S. imports by volume, overtaking shipments from China for the first time in more than a decade.

The surge reflects the success of India's aggressive push to become a global manufacturing hub for consumer electronics—and highlights how U.S. buyers and tech giants are diversifying away from Chinese assembly lines in response to rising tariffs, export controls, and supply chain security concerns.

MAJOR BRANDS SHIFT PRODUCTION TO INDIA

Apple, Samsung, and other major smartphone manufacturers have significantly ramped up production in India over the past two years. Apple alone is now assembling multiple iPhone models— including its flagship iPhone 15 series—through suppliers such as Foxconn, Pegatron, and Wistron operating in southern Indian states like Tamil Nadu and Karnataka.

The Indian government's Production-Linked Incentive (PLI) scheme, launched to boost domestic electronics output, has played a central role in attracting foreign investment. The PLI offers tax rebates and cash incentives to manufacturers that meet export and value-addition targets. As a result, global suppliers have committed billions to expanding assembly lines, component sourcing, and logistics infrastructure inside India.

Samsung, which opened one of its largest smartphone factories globally in Uttar Pradesh in 2018, continues to increase its output for both domestic and export markets. According

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to government sources, nearly 40% of smartphones manufactured in India are now destined for international markets, with the U.S. being the largest single recipient.

CHINA FACES PRESSURE FROM POLICY AND GEOPOLITICS

China remains the world's largest electronics manufacturer, but its dominance in the smartphone sector is beginning to erode due to a mix of external and internal challenges. Intensifying trade tensions with the United States, combined with stricter export restrictions on key technologies, have pushed companies to rethink their exposure to Chinese manufacturing.

In addition, higher labor costs and ongoing uncertainty surrounding Chinese industrial policy are prompting multinationals to adopt a "China+1" strategy, in which India has emerged as the most viable alternative. India offers both scale and a large domestic consumer base, creating a favorable environment for firms to localize assembly and reduce reliance on single-nation sourcing.

U.S. importers, meanwhile, are actively shifting procurement strategies to reduce exposure to future tariff disruptions and ensure compliance with evolving trade regulations, especially those linked to national security and human rights issues.

EXPORT GROWTH BACKED BY STRONG INFRASTRUCTURE INVESTMENT

India's export rise has also been supported by substantial government and private sector investments in logistics, port capacity, and component ecosystems. The rollout of dedicated freight corridors, simplified customs processes, and enhanced port connectivity has made it easier for Indian factories to meet tight global shipping timelines.

The Indian electronics manufacturing sector is now pushing further into upstream components such as batteries, chip packaging, and display assembly—steps that are expected to deepen supply chain localization and reduce import dependencies.

Experts note that while India still imports many core components, its growing role in final assembly and testing gives it significant leverage in global value chains. The next phase of development will focus on scaling local sourcing to match the rising export volume.

OUTLOOK: INDIA'S MOMENT IN GLOBAL TECH SUPPLY CHAINS

With exports climbing and global brands committing long-term investments, India's smartphone manufacturing sector is entering a phase of sustained momentum. Government officials have indicated that additional PLI schemes and incentives are being planned to further strengthen the sector, with a focus on semiconductors, 5G components, and electronics clusters.

Analysts see India's shift from a domestic consumption market to a global production center as a key structural transformation. While China will remain a crucial player in electronics for years to come, the balance is clearly shifting. India's rise as a smartphone export leader to the U.S. is not a short-term anomaly—it signals a realignment of the world's technology supply chains.

YOUR BRAND HAS NEVER BEEN IN SUCH GOOD COMPANY

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SPECIAL EDITION* Spirits were high at Apple's 'There's more in the making' event, which was held at the Howard Gilman Opera House in Brooklyn, New York on October 30. Hot off the heels of the launch of the new iPhone XS, XS Max and XR, Tim Cook and Co were ready to show off next-generation models of two of the company's most beloved products: the Mac, and the iPad. Introducing a whole host of new editions, this was an Apple event to

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